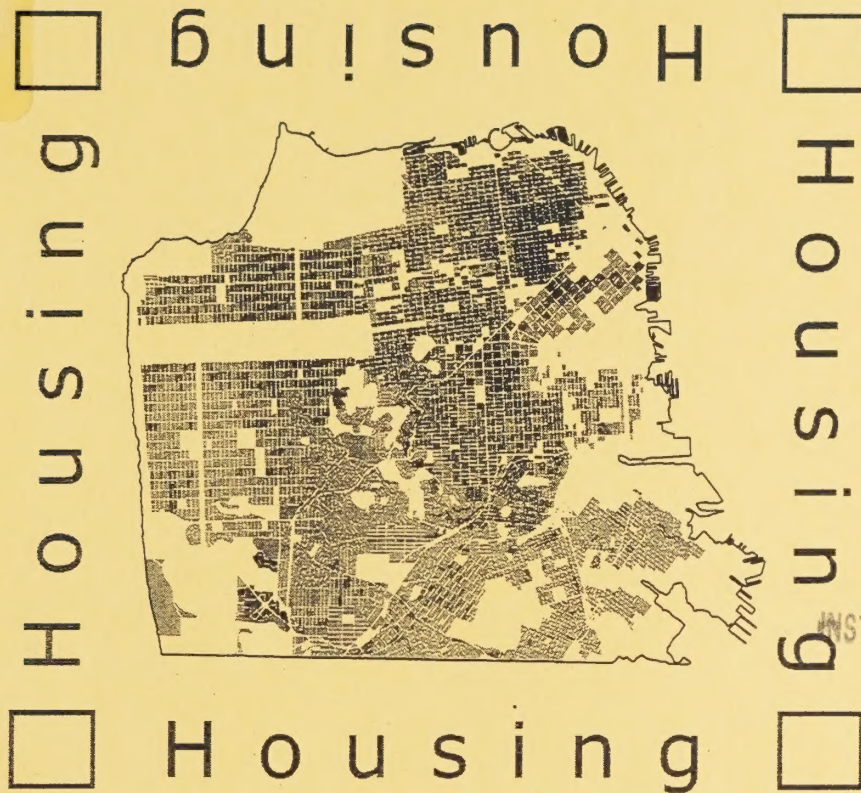


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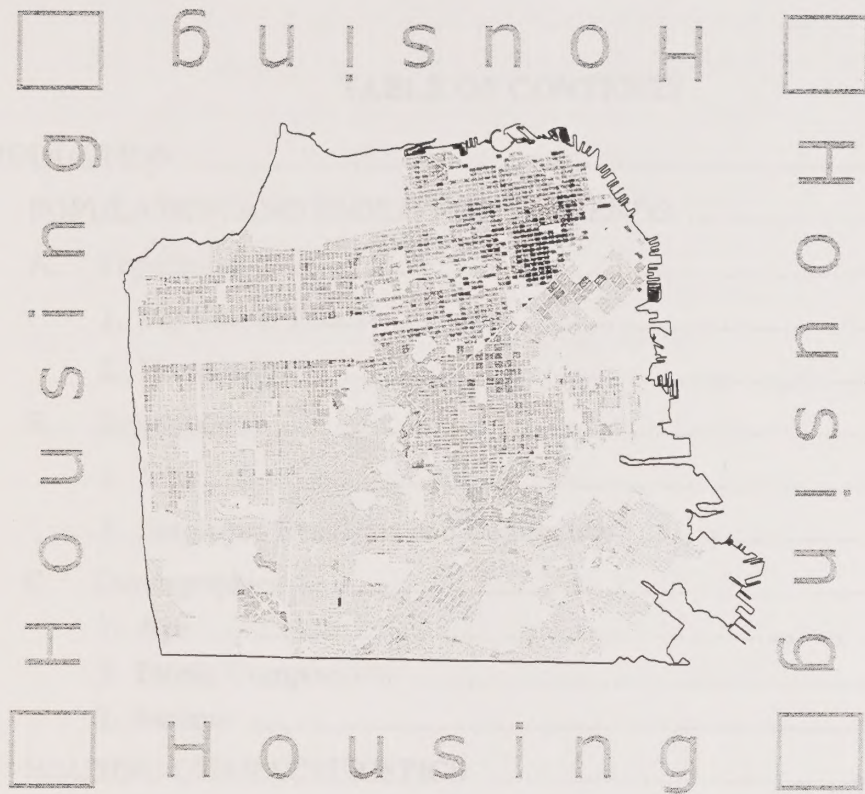
Housing Element Revision

*An Element of the
San Francisco General Plan*

Draft For Public Review



Citywide Policy Planning
The San Francisco Planning Department
June 1, 2001



Data and Needs Analysis

Part One of the

2001

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INTRODUCTION

This report, *Data and Needs Analysis*, is a draft for public review of the first of three sections of San Francisco's revised Housing Element. The Housing Element, part of the City's General Plan, will be updated in its entirety by the end of calendar year 2001. This "Background Report" provides information relevant to housing issues in the city, and to the formulation of housing policy in San Francisco.

This report contains a description and analysis of San Francisco's population and employment trends; changing demographics; housing characteristics; overall housing need, and that of specific special needs groups; and capacity for housing based on land supply and site opportunities. The report also provides a discussion of various resources available to support sound housing policy in San Francisco, as well as barriers that hinder housing efforts. While information is presented on long-term trends and projections, particular attention is given to changes over the last 11 years (the last time a fully updated Housing Element was completed), and to expected developments of the next five years, at which time the Housing Element will again be updated.

The descriptive material and needs analysis from this report are meant to inform the housing policies and implementation strategies that will comprise the next two components of the Housing Element. Part Two will present the City's *Objectives and Policies* to address the identified housing needs and constraints. Policies will be stated in general terms and are intended to provide guidance to the City in dealing with housing issues in the years ahead. This later section will also include an evaluation of the effectiveness of the current Housing Element and current programs in meeting housing goals.

The statement of policies and objectives will then provide the framework for Part Three of the Housing Element, *Implementation Programs*. The last section of the element will lay out a five-year action plan of the actual activities and programs that will be used to achieve the City's stated goals for housing.

Meaningful community involvement is critical to the value and ultimate effectiveness of the revised Housing Element. Decisions on housing policy affect all residents of the City, and members from the community can offer a wealth of ideas, expertise, and passion about housing in their city. The update of this element provides an opportunity for San Franciscans to discuss the many complex and often contentious issues surrounding housing and housing needs in the City.

The Planning Department intends to present a draft of each section of the updated Housing Element to the Planning Commission and to the Board of Supervisors' Committee on Housing, Transportation, and Land Use. These presentations will be followed by a series of community meetings as needed to review the draft reports, receive public input, and provide a forum to discuss housing issues. These meetings will vary in format and location throughout the City, and will benefit from the involvement and co-sponsorship by the numerous public agencies, advocacy groups, and industry professionals active in San Francisco housing issues. Additionally, all of the released draft reports of the Housing Element will be available on the internet through the Planning Department's web page (www.ci.sf.ca.us/planning), along with the ability to respond and provide comments online.

I. POPULATION AND EMPLOYMENT TRENDS

Two major factors that affect the city's housing needs are San Francisco's population and employment trends.

The decade of the 1990s was a dynamic time for the people and economy of San Francisco. Over the ten year period, the City experienced a population growth rate of 7.3% (52,774 new people), and a job growth rate of 8.6% (49,680 new jobs). Much of this growth occurred in the later part of the decade, as the city's economy recovered dramatically from a recession in the early 1990s that saw over 30,000 jobs lost.

Average household size in 2000 increased slightly from that of ten years ago, and it is expected to continue to rise as a result of larger family sizes and residents who share accommodations in San Francisco's tight housing market. The median age of the San Francisco resident has also risen since 1990, and will continue to do so in the face of the aging "baby boom" generation.

San Francisco continues to be a culturally and racially diverse place. Though the 1990 Census revealed that all "minority" ethnic groups combined actually represented a majority of the city's residents, 2000 marks the first time in modern history that no single racial group alone constitutes a majority of the population. Although a robust economy has generated considerable wealth and opportunity for many across the San Francisco Bay Region, many city residents have not shared these economic gains, and over 26% of San Francisco households still earn less than 50% of the region's median income.

A. POPULATION

1. Population Totals

The City's population has grown substantially since 1980, after three decades of population decline (Graph 1). According to the U.S. Census Bureau, San Francisco's population grew from 678,974 in 1980 to 776,733 in the year 2000. Based on the U.S. Census and population estimates from the Association of Bay Area Governments (ABAG), the City grew by 33,265 people in the five-year period from 1995-2000. San Francisco's growth rate was higher over the last ten years (7.3%) than it was from 1980-1990 (6.63%), but is expected to taper considerably by 2010.

ABAG projects growth rates that would bring San Francisco's population to 792,870 by 2005 and to 795,981 by 2010, an increase of 19,248 persons who will need to be housed over the next ten years. In Table 1, population totals from 1990 and 2000 are from the U.S. Census. Projected population totals for 2005 and 2010 are derived by applying ABAG's projected growth rates for San Francisco to the most recent census totals.

TABLE 1
San Francisco Population Trends

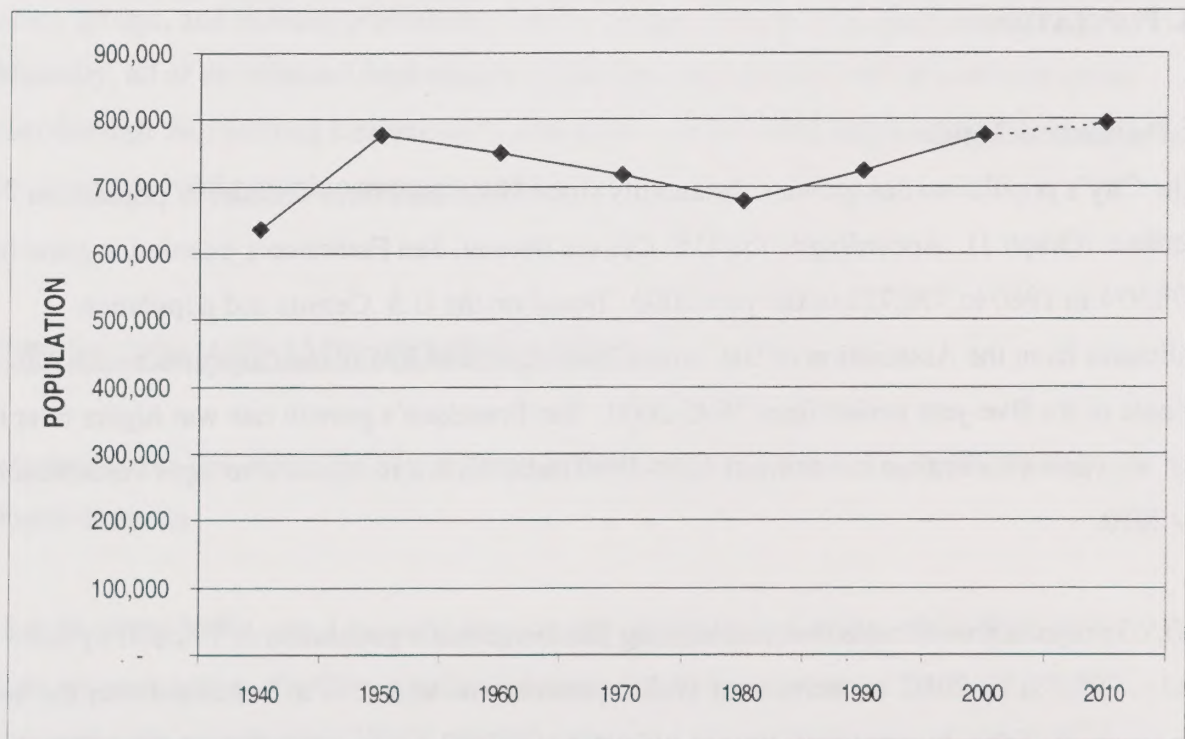
San Francisco Population Trends	<u>1980*</u>	<u>1990*</u>	<u>2000*</u>	<u>2005**</u>	<u>2010**</u>
Household Population	654,511	699,330	754,568 (e)	770,608	773,622
Group Housing Population	24,463	24,629	22,165 (e)	22,262	22,359
Total Population	678,974	723,959	776,733	792,870	795,981

*Census Bureau

**ABAG Projections 2000 (Adjusted)

(e) - estimated

GRAPH 1
San Francisco Population Trends and Projections



2. Households

A household is defined by the Census as “all the persons who occupy a housing unit . . . may be a single family, one person living alone, two or more families living together, or any other group of related or unrelated persons.”

The most recent Census indicates that the number of households has increased by 24,116 from 305,584 in 1990 to 329,700 in 2000. As shown in Table 2, the San Francisco average household size increased slightly in the last ten years, but is still smaller than the Bay Area average. Based on ABAG projections, the number of households will continue to increase from 329,700 in 2000 to 340,754 in 2010, at an average of 1,105 new households per year.

TABLE 2
Household Growth

	<u>1980</u>	<u>1990</u>	<u>2000</u>	<u>2010*</u>
<u>San Francisco</u>				
No. of Households	298,956	305,584	329,700	340,754
Persons per Households	2.19	2.29	2.30	2.28
Household Population	654,511	699,330	756,976	776,091
<u>Bay Area</u>				
Persons per Households	2.57	2.61	2.78	2.81
* estimate				
Source: U.S. Census Bureau, ABAG Projections 2000				

TABLE 3
Family and Non-family Households

	1990	2000
Family Households	141,790	145,186
All Households	305,584	329,700
Family Households as Percent of All Households	46.4%	44.0%
Source: U.S. Census Bureau		

The 1980 census documented a population decline of 36,000 from 1970 to 1980, and only a slight increase in the number of households during this period. This resulted in a decrease in the average number of persons per household. The decline in the number of persons per household reversed itself after 1980 with the large increase in population being absorbed mostly in the existing housing stock between 1980 and 1985.

The average household size increased slightly between 1990 and 2000, indicating changes in family size and the doubling-up of occupants in existing housing units. ABAG projects that the number of persons per household will level off in the next ten years, with only a slight increase in average household size by 2010. Almost 70% of all households in the City are comprised of one or two people. This percentage grew noticeably from 1960-1980, and has remained around its present level since that time. The proportion of households over five people declined somewhat since 1960, but appears to have grown slightly again in recent years. The proportion of households with three to five people has stayed about the same proportionally since the 1990 census.

TABLE 4
Household Size

	1960		1970		1980		1990		1999	
	No.	% of Total	No.	% of Total	No.	% of Total	No.	% of Total	No.	% of Total
1	98,399	33.7%	110,333	37.4%	123,915	41.4%	120,047	39.2%	126,082	39.1%
2	90,154	30.9%	90,753	30.7%	90,681	30.3%	91,894	30.0%	96,447	29.9%
3	42,344	14.5%	38,024	12.9%	36,554	12.2%	38,158	12.5%	83,417	25.9%
4	29,304	10.0%	25,348	8.6%	23,321	7.8%	26,532	8.7%		
5	16,204	5.5%	14,668	5.0%	12,335	4.1%	14,504	4.7%		
6+	15,570	5.3%	16,048	5.4%	12,150	4.1%	14,849	4.9%	16,644	5.2%
	291,975		295,174		298,956		305,984		322,590	

Source: Bureau of Census; Claritas for 1999 Estimate

TABLE 5
Average Number of Persons per Dwelling Unit

	<u>1980</u>	<u>1990</u>	<u>2000</u>
All Households	2.19	2.29	2.30
Family Households	3.20	3.35	3.32
Non-Family Households	1.27	1.49	n/a
Source: U.S. Census			

B. Employment

1. Jobs

Employment growth in San Francisco is another component of the city's housing needs. As shown in Table 6, total employment in San Francisco has been growing steadily since 1970.

TABLE 6
San Francisco Employment Trends and Projections

<u>Year</u>	<u>Employment</u>
1970	494,129
1980	552,200
1990	579,180
2000	628,860
2010	687,350
2020	731,660
Net Change	
1990-2000	49,680
Net Change	
2000-2010	58,490

Source: Census, ABAG Projections 2000

From 1990-2000, San Francisco experienced an overall job growth rate of over 8.5%, an increase of almost 50,000 jobs in ten years. The City's population grew by 52,000 people during that same time period, exhibiting almost a 1:1 ratio in the growth of people to jobs. Most of this job growth occurred in the latter part of the decade, as San Francisco recovered dramatically from a significant economic recession in the early 1990s. From 1990-1995, it is estimated that the city lost almost 30,000 jobs. The most current employment projections from ABAG show a growth of 58,490 new jobs between 2000 and 2010 and an additional 44,310 new jobs by the year 2020.

As shown in Table 7, much of the employment growth from 1990 to 2000 occurred in the overall Service sector (48,240 new jobs). The construction industry also grew by 21% over this ten year period (3,400 jobs). Most of the projected new employment growth will also be represented by Service related jobs, as the sector is expected to grow by another 38,490 jobs between 2000 and 2010.

TABLE 7
San Francisco Employment

Industry	<u>1990</u>	<u>1995</u>	<u>2000</u>	<u>2005</u>	<u>2010</u>
Agriculture	2,300	2,220	2,300	2,310	2,280
Construction	16,350	15,810	19,750	20,990	21,600
Manufacturing	39,790	40,440	41,800	44,130	44,860
Transportation	40,290	39,840	44,180	45,920	47,860
Wholesale	30,560	24,020	25,150	27,550	27,730
Retail	80,120	75,860	81,310	83,370	84,760
F I R E	75,400	71,350	75,820	78,550	79,980
Services	229,470	231,190	277,710	296,230	316,200
Government	64,900	58,570	60,840	61,560	62,080
TOTAL	579,180	559,300	628,860	660,610	687,350
Source: ABAG Projections 2000					

2. Employed Residents and Commuters

The number of employed residents in San Francisco dropped noticeably between 1990 and 1995 in the face of economic recession, but that trend was dramatically reversed in the latter part of the decade with an increase of 42,300 employed residents from 1995-2000 (Table 8). ABAG's *Projections 2000*, indicate this growth trend will continue over the next ten years (32,000 additional employed residents), with a slower increase occurring between 2010 and 2020 (13,200 new employed residents).

TABLE 8
Growth of Employed San Francisco Residents

	<u>Year</u>	<u>Employment</u>
	1990	391,292
	1995	379,800
	2000	422,100
	2005	439,600
	2010	454,100
Change 1990-1995		(11,492)
Change 1995-2000		42,300
Change 2000-2005		17,500
Change 2005-2010		14,500
ABAG Projections 2000		

The number of workers per household in the City grew significantly from 1980 to 1990, and continued to increase from 1990 to 2000 (Table 9). The difference between the City's average workers per household and that of the region is expected to increase slightly over the next ten years.

TABLE 9
Average Number of Workers per Household

<u>Average Number of Workers Per Household</u>					
	<u>1990</u>	<u>1995</u>	<u>2000</u>	<u>2005</u>	<u>2010</u>
SAN FRANCISCO	1.28	1.23	1.34	1.37	1.39
BAY AREA REGION	1.40	1.34	1.45	1.49	1.51
ABAG Projections 2000					

Commuters into San Francisco hold 47% of the jobs in the City. Almost 52% of these workers come to the City via the Bay Bridge corridor. The number of San Francisco jobs held by commuters and the estimated growth in commuter jobs through 2020 is shown below:

TABLE 10
San Francisco Commuter Growth

	<u>Jobs in San Francisco</u>		
	<u>Commuters</u>	<u>SF Residents</u>	<u>Total Jobs</u>
1990	250,909	328,271	579,180
2000	280,863	347,997	628,860
2010	313,239	374,111	687,350
Annual Increase 1990 - 2000	2,995	1,973	4,968
Annual Increase 2000 - 2010	3,238	2,611	5,849

C. DEMOGRAPHICS

1. Age

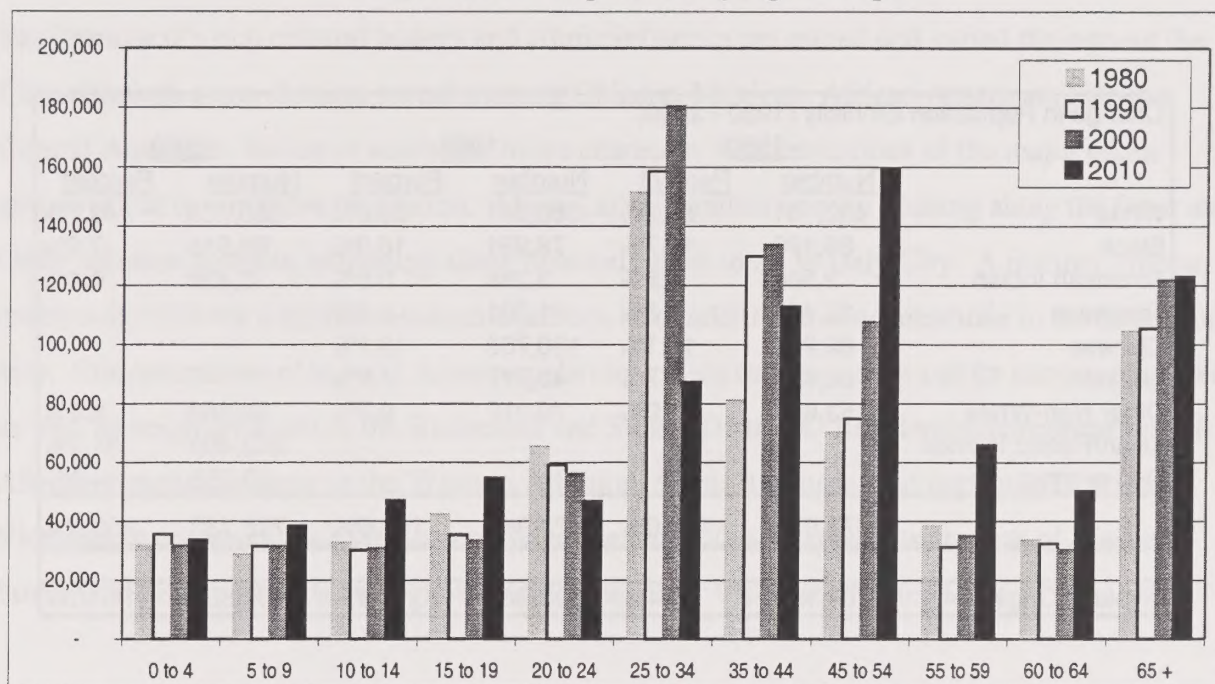
Similar to trends in California and the country as a whole, San Francisco's population is getting older as the "baby boom" generation ages. From 1990 to 2000, the 45-54 age group grew by 51,235 persons, exhibiting the highest growth rate of any group in the population (68.4%) (Table 11). Similarly, the 55-59 age group is expected to grow by 64% from year 2000 to 2010. San Francisco's population saw a significant decrease in the number of individuals aged 20-34 between 1990 and 2000 (-31.3% or -67,437 people). This trend is expected to continue for the 25-34 age group, which is projected to decrease by another 22,700 individuals by 2010 (a 20.6% decrease from year 2000). Likewise, the number of children under 10 years of age is projected to decrease over the next ten years.

TABLE 11
Change in Size of Various Age Groups, 1980-2010

Change in Size of Various Age Groups (1980, 1990, 2000, 2010)				
	<u>1980</u>	<u>1990</u>	<u>2000</u>	<u>2010</u>
0 to 4	31,537	35,599	31,633	33,600
5 to 9	28,596	31,562	31,564	38,400
10 to 14	32,674	30,140	30,813	47,000
15 to 19	42,374	35,362	33,334	54,800
20 to 24	65,242	59,103	56,054	46,800
25 to 34	151,222	158,534	180,418	87,300
35 to 44	81,143	129,853	133,804	112,800
45 to 54	70,025	74,865	107,718	159,100
55 to 59	38,480	31,193	35,026	65,800
60 to 64	33,396	32,368	30,258	50,200
65 +	104,285	105,380	106,111	123,000
Total	678,974	723,959	776,733	818,800
Median Age	33.6	35.3	36.5	43.6
Source: U.S. Census, ABAG Projections 2000				

GRAPH 2

San Francisco Population by Age Groups



Source: U.S. Census, ABAG Projections 2000

2. Ethnic Composition

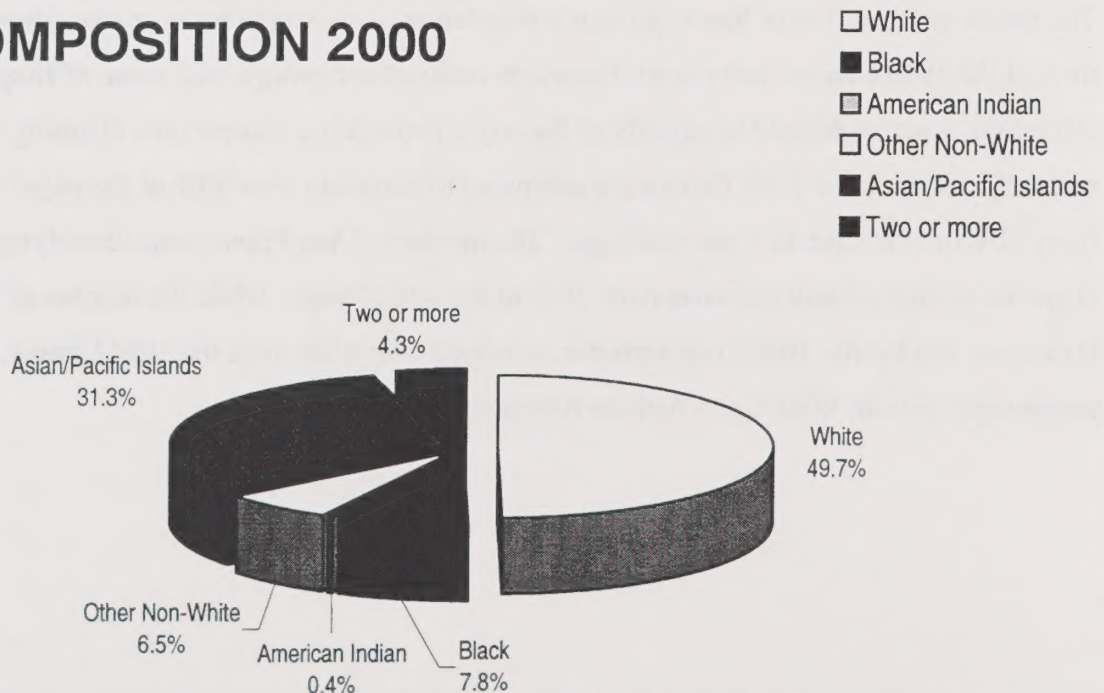
The ethnic composition of San Francisco's population continues to become more diverse. At the time of the 1990 Census, individuals from non-white ethnic groups, and those of Hispanic affiliation, together formed a majority of the city's population. People now claiming non-white racial affiliation in the 2000 Census are estimated to comprise over 50% of the population, up from 41% in 1980 and 46% ten years ago. The number of San Franciscans identifying with Hispanic origins (of any race) has risen 30% in the last 20 years, while the number of Asian, Hawaiian, and Pacific Island residents has increased over 45% since the 1980 Census. The percentages of both Whites and African Americans fell since 1990.

TABLE 12
Change in Population Ethnicity

Change in Population Ethnicity (1980 - 2000)						
	1980		1990		2000	
	Number	Percent	Number	Percent	Number	Percent
White	402,131	59.2%	388,341	53.6%	385,728	49.7%
Black	86,190	12.7%	78,931	10.9%	60,515	7.8%
American Indian	3,566	0.5%	3,354	0.5%	3,458	0.4%
Japanese	12,461	1.8%	11,591	1.6%		
Chinese	82,244	12.1%	130,753	18.1%		
Filipino	38,690	5.7%	40,977	5.7%		
Other Non-White	53,692	7.9%	70,012	9.7%	50,368	6.5%
Asian/Pacific Islands					243,409	31.3%
Two or more					33,255	4.3%
	678,974	100.0%	723,959	100.0%	776,733	100.0%
Hispanic Origin	84,194	12.4%	96,640	13.3%	109,504	14.10%

GRAPH 3

SAN FRANCISCO ETHNIC COMPOSITION 2000



San Francisco's rich cultural history and ethnic influence are mixed and varied throughout the City, although some districts reveal a strong Chinese, Mexican, African American, Filipino, Central American, Italian or southeast Asian character. Concentrations of the major ethnic groups occur in a number of districts. Many Latino families occupy housing along the Inner and Outer Mission districts, extending along Mission Street south to Daly City. A distinct Filipino community follows a similar residential pattern, with additional concentrations in the Excelsior area. Concentrations of several Asian populations reside in Chinatown and its surrounding areas, as well as neighborhoods in the Richmond and Sunset Districts. Residential concentrations of African Americans occur in the Western Addition, South Bayshore, and Ingleside Districts. Vietnamese communities have a strong presence in the Tenderloin District north of Market Street, and neighborhoods throughout the Bayview and Visitacion Valley areas.

3. Income

An important dimension of housing need is the ability of families and residents to pay housing costs. San Francisco's household incomes are lower than regional averages due in part to concentrations of single person households and lower income families in the City. According to the Census Bureau's 1999 American Community Survey, San Francisco's median household income is just under \$48,000. The median family income is slightly higher than that of all households in the city. Roughly 40% of San Francisco households make less than 80% of the median income. Additional analysis on San Francisco's household income distribution will be produced as the U.S. Census 2000 data becomes available.

TABLE 13
Income Distribution

	Income Distribution			
	<u>Very Low</u> (<50% of median)	<u>Low</u> (50-80% of median)	<u>Moderate</u> (80-120% of median)	<u>Above Moderate</u> (>120% of median)
All SF Households	26.3%	14.1%	15.7%	43.9%
Median Income for SF, 1999	\$47,962			
Source: estimates from ACS, 1999				

The U.S. Census defines a household as a family or a group of unrelated persons living together or one person living alone. A family household is a household consisting of persons related by birth, marriage, or adoption, and a non family household is comprised of unrelated persons or one person living alone. According to the U.S. Census' American Community Survey, 41% of San Francisco households in 1999 were family households, and 37% of all households consisted of one person.

TABLE 14
Changes in San Francisco Household and Family Income

	<u>1980</u>	<u>1990</u>	<u>2000*</u>
Household Income			
Median	\$15,867	\$33,414	\$47,962
Average	\$20,617	\$45,664	\$67,473
Family Income			
Median	\$20,911	\$40,561	\$55,439
Average	\$25,876	\$54,609	n/a
HUD Median Family Income (four person household)	\$23,400	\$45,600	\$80,100
*estimate from 1999 American Community Survey			

For 2001, HUD has determined the following household income standards for San Francisco County.

TABLE 15
Household Income Standards by Household Size, 2001

<u>Income Categories</u> (% of median income)	Number of persons				
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>
Very low (50% of AMI)	\$29,750	\$34,000	\$38,250	\$42,500	\$45,900
Low (80% of AMI)	\$47,600	\$54,400	\$61,200	\$68,000	\$73,450
Median (100% of AMI)	\$56,050	\$64,100	\$72,100	\$80,100	\$86,500
Moderate (120% of AMI)	\$67,250	\$76,900	\$86,500	\$96,100	\$103,800
(AMI: Area Median Income)					
Source: HUD					

II. HOUSING CHARACTERISTICS

This section provides background information on the physical and qualitative characteristics of the City's housing stock, important factors for informed housing policy.

San Francisco's housing stock is relatively older than many West Coast cities, with over 50% of the City's housing units constructed before World War II. Totalling about 340,000 units, the City's housing units are roughly divided into low, mid, and higher density structures. San Francisco's housing tends to be smaller in size, with 75 % of all units containing two bedrooms or less. San Francisco continues to be a city of renters, who occupy 65% of housing units in the City.

Over 10,000 new housing units were completed in San Francisco since 1991, but this total is down noticeably from the previous ten year figure of almost 15,000 units between 1981 and 1990. Since 1990, 25% of all new housing occurred on industrially zoned lands in the South of Market district, and many of these new units came in the form of live/work units. Live/work units represent almost 21% of all new housing from 1991-2000. Although many live/work units are utilized as primary residences by their occupants, the units are considered commercial uses in the Planning Code. Therefore, it is difficult to produce an accurate estimate on the number of live/work units used as a primary residence. Almost 75% of new housing in the last ten years was built in larger structures with 10 or more units.

Housing affordability continues to be a major concern to city households, as San Francisco has one of the tightest rental markets and one of the most expensive home ownership markets in the country. Almost 30% of new housing built in the City since 1990 qualified as affordable, but it is still estimated that almost 80% of San Francisco households could not afford the average monthly asking rent for a market rate two bedroom apartment in 1999.

A. EXISTING HOUSING STOCK

San Francisco houses its population in approximately 340,000 housing units, of which roughly one-third are located in low density single family buildings, one-third in medium density two to nine unit buildings, and another third in higher density buildings with 10 or more units.

Approximately one-half of San Francisco's developable land area is primarily devoted to residential use. Of the residential zoned acreage, a majority of the area (76%) is zoned for single family and two unit housing at a density of approximately 10 to 29 units per acre. Other residential areas have substantially higher densities, such as the Van Ness corridor and neighborhoods north of Market Street, bringing the citywide average density to 15 dwelling units per acre. This figure is a net density, and does not include land area dedicated to streets or right of ways. Of housing built in 2000, 52% of the new units occurred in some type of "R" residential district. Twenty-three percent of the new units were built on industrial or heavy commercial designated lands.

Fifty-four percent of San Francisco's housing stock was built prior to 1940. New construction since 1990 accounts for slightly more than 3% of the City's total housing stock. Housing added in the last twenty years represents almost 7% of all units. Although older, most of the housing stock is in sound condition.

Dwelling units in San Francisco are generally small in size. In 1996, 75% of all units had two bedrooms or less. Less than 7% of all housing units had four or more bedrooms. These units were primarily in single family homes and two unit residential flats. The City has not collected information on housing unit size since 1996.

While most single family homes are owner occupied, roughly 65% of housing units in the City are occupied by renters. San Francisco's homeownership rates have increased slightly over the past 20 years as 33% of the City's households owned their homes in 1980, and 35% were owners in 1990. The city's homeownership rate now stands at 35%.

TABLE 16
San Francisco Housing Characteristics

<u>Housing Stock</u>	339,579	<u>Age of Housing By Year Built</u>	
Single family	31%	1980-2000	7%
2-4 units	24%	1960-1979	14%
5-9 units	11%	1940-1959	25%
10-19 units	11%	1939+ earlier	54%
20+ units	23%		
<u>Unit Size*</u>		<u>Tenure Status</u>	
1 bedrm or less	44%	Owner Occupied	35%
2 bedrms	31%	Renter Occupied	65%
3 bedrms	18%		
4+ bedrms	7%		
* as of 1996			
Source: SF Planning Department			

TABLE 17*Housing Characteristics By Planning District*

Planning District	Single Family	2 to 4 Units	5 to 9 Units	10 + Units	District Total
1 Richmond	10,206	15,291	5,146	6,088	36,731
Percent	28%	41%	14%	17%	10.8%
2 Marina	2,737	5,885	3,690	13,290	25,602
Percent	11%	23%	14%	52%	7.5%
3 Northeast	1,456	6,999	6,403	21,620	36,478
Percent	4%	19%	18%	59%	10.7%
4 Downtown	90	402	507	24,675	25,674
Percent	0%	2%	2%	96%	7.6%
5 Western Addition	1,554	6,042	3,910	16,229	27,735
Percent	6%	22%	14%	59%	8.2%
6 Buena Vista	1,743	7,015	3,360	3,915	16,033
Percent	11%	44%	21%	24%	4.7%
7 Central	8,143	10,045	3,039	4,789	26,016
Percent	31%	39%	12%	18%	7.7%
8 Mission	2,333	8,775	4,255	6,662	22,025
Percent	11%	40%	19%	30%	6.5%
9 South of Market	2,117	2,748	1,411	7,272	13,548
Percent	16%	20%	10%	54%	4.0%
10 South Bayshore	6,654	1,754	913	621	9,942
Percent	67%	18%	9%	6%	2.9%
11 Bernal Heights	5,136	2,998	481	517	9,132
Percent	56%	33%	5%	6%	2.7%
12 South Central	19,491	2,712	1,032	1,921	25,156
Percent	77%	11%	4%	8%	7.4%
13 Ingleside	15,736	1,434	469	4,679	22,318
Percent	71%	6%	2%	21%	6.6%
14 Inner Sunset	9,717	4,212	1,484	2,591	18,004
Percent	54%	23%	8%	14%	5.3%
15 Outer Sunset	18,639	4,065	1,355	1,155	25,214
Percent	74%	16%	5%	5%	7.4%
CITYWIDE TOTAL	105,752	80,377	37,455	116,024	339,608
Percent	31%	24%	11%	34%	100.0%

MAP 1
Planning Areas of San Francisco



1. Changes In Housing Stock, 1990-2000

Accounting for new production, demolitions, and alterations, the city has seen a net change of 11,200 additional housing units in the last eleven years. From 1990 to 2000 a total of 12,434 new housing units have been completed at an annual rate of about 1,130 units per year (eleven year total) (Table 18). Housing production rates slowed noticeably in the early and mid 1990s, as San Francisco continued to feel the effects of California's economic recession. Net new units from 1992-1995 averaged only 650 per year. In the six years from 1995-2000, the city's housing stock grew by 5,532 units, at a rate of 922 per year. The last two years have again seen an increase in the city's housing production, and the 1,626 units completed in 2000 represent the highest single year total since 1991.

2. Type and Location of New Construction

Downtown, the Western Addition, and South of Market areas absorbed most of the new housing development in the last eleven years, together accounting for 7,086 new units (57% of all new housing during that period). Since 1990, the total number of housing units in the South of Market planning area grew by 31%. This figure includes live/work development during that time. Since 1998, the South of Market area has seen 864 new housing units completed.

The other large increases in housing stock by planning district over the last 11 years were the Western Addition (9%), Bayshore (7%), and Downtown (5%).

Most of the new construction in the last 11 years has occurred in larger structures, with 84% of the new housing developed in buildings with more than two units (Table 19). From 1990-1996, unit size characteristics of the city's housing stock did not significantly change. In 1996, 56% of all housing units contained two or more bedrooms, the last year the City recorded such information.

3. Pipeline

In addition to new housing completed recently, housing in the production “pipeline” is an important indicator of the City’s future housing development. The housing pipeline refers to units that are in the planning and pre-construction stages of development, but are not yet completed. For the purposes of this report, the Planning Department defines the pipeline as those projects that have been approved by the Building Department within the past three years or filed within the past five years.

The department estimates that these projects could result in as many as 4,000 additional housing units in San Francisco over the next few years. This number does not include new projects that will be filed and completed in the coming years, only those that already have obtained approval. A more detailed discussion of expected housing production, as well as potential housing supply, is given in later sections of this report.

4. Live/Work

Although the City’s Planning Code considers live/work units as commercial space, they also serve as housing units, and the Planning Department tracks information on live/work units in its annual housing inventory. In the ten years from 1991-2000, 2,133 live/work units were produced in San Francisco, and a total of 2,330 live/work units have been completed since 1987. Construction of live/work units surged in the past two years, as new units from 1999 and 2000 totaled 1,003, 35% of all new housing during that time period.

Over 71% of all completed live/work units are located in the South of Market planning area. Over 78% of live/work units that have yet to receive final certificates of occupancy are in projects located in the South of Market.

Concerned with distortions in the housing supply and with the displacement of industry, the San Francisco Board of Supervisors, in February 2001, passed a six-month moratorium on the construction of new live/work units in the city. The temporary moratorium was intended to halt the approval of new projects while the impact of live/work units on the city’s housing market and industrial lands is studied. In August 1999, the Planning Commission had already adopted

interim zoning controls for southeastern portions of the city aimed at reserving some industrially zoned lands there from competing uses. These controls, set to expire in August 2001, created Industrial Protection Zones where new housing and live/work units are not allowed, and accompanying Mixed Use Districts where housing would be encouraged.

GRAPH 6

S.F Housing Trends: New Construction and Demolitions, 1990-2000

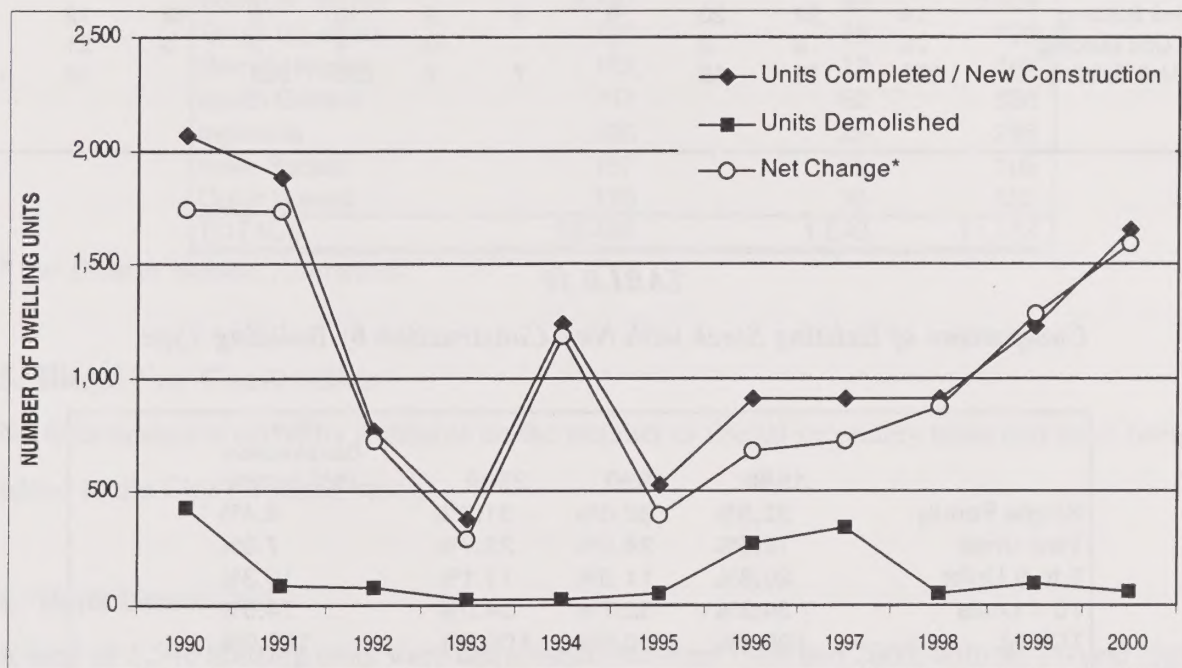


TABLE 18

Annual Change in Housing Units by Structure Type, 1990-2000

Annual Change in Housing Units by Structure Type											
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
New Units Total	2,065	1,882	767	379	1,234	532	909	906	909	1,225	1,626
Single Family	89	79	111	51	63	69	84	165	117	181	99
2 Unit Building	48	62	100	74	62	54	142	100	60	106	122
3-9 Unit Building	190	129	96	56	121	89	159	127	96	160	217
10 - 19 Unit Building	156	87	79	36	16	89	241	110	190	162	141
20 + Unit Building	1,582	1,525	381	162	972	231	283	404	446	616	1,047
Units Demolished	433	90	76	26	25	55	278	344	54	98	61
Single Family	18	46	35	17	14	33	31	29	36	55	31
2 Unit Building	14	22	20	6	4	2	10	10	12	12	18
3-4 Unit Building	25	6	3	3	-	13	4	3	6	21	12
5+ Unit Building	376	16	18	-	7	7	233	302	-	10	-

TABLE 19

Comparison of Existing Stock with New Construction by Building Type

	1980	1990	2000	New Construction 1990 to 2000
Single Family	32.3%	32.0%	31.3%	8.4%
Two Units	12.6%	24.0%	23.7%	7.3%
3 to 9 Units	20.8%	11.3%	11.1%	10.3%
10 + Units	34.3%	32.7%	34.0%	74.0%
TOTAL	100.0%	100.0%	100.0%	100.0%
Source: U.S. Census; S.F. Planning Department				

TABLE 20

Existing Stock by Unit Size

	1980	1990	1996
Studio	11%	15%	15%
One Bedroom	29%	29%	29%
Two Bedroom	38%	31%	31%
Three + Bedroom	22%	25%	25%
	100%	100%	100%

TABLE 21***Changes in the Housing Stock by Planning District, 1990-2000***

	Units Completed	Units Demolished	Net Change*
Richmond	478	138	372
Marina	375	39	283
Northeast	752	31	702
Downtown	1,148	32	1,140
Western Addition	2,817	540	2,246
Buena Vista	174	205	(73)
Central	372	65	371
Mission	877	245	708
South of Market	3,147	40	3,404
South Bayshore	720	16	702
Bernal Heights	182	12	162
South Central	747	52	630
Ingleside	328	28	296
Inner Sunset	167	62	105
Outer Sunset	176	35	125
TOTALS	12,460	1,540	11,173

* Net Change includes Alterations.

5. Illegal New Construction

No information is currently available on the number of illegal secondary units that have been added to the City's housing stock.

6. Units Demolished

A total of 1,540 housing units were demolished between 1990 and 2000, with an 11-year high 433 demolished units in 1990. The number of units demolished from 1995-2000 totaled 890, at an annual average rate of 148 per year. As shown in Table 21, 35% of all units demolished since 1990 were located in the Western Addition, while 16% of removed units were demolished in the Mission District.

The rate of residential demolition has decreased significantly over the past 30 years. In the early 1970s, an average of 750 housing units per year were demolished. Over the 1980s, the demolition rate fell to 181 units per year. From 1991-2000, an average of 111 housing units have been demolished per year.

Most of the 622 units demolished in 1996 and 1997 were older, larger public housing structures to be replaced by new public and affordable housing developments. Single-family homes represented 22% of residential units demolished from 1996-2000 (182 units), while housing in structures with 5 or more units comprised 65% of all units demolished in the same time period (545 units).

7. Other Changes to the Housing Stock

In addition to changes resulting from new construction and demolition, the quantity of housing in the City can be altered by other factors including the subdivision of units, dwelling unit mergers, elimination of units via code enforcement, and vertical or horizontal additions to existing buildings. Residential units can also be gained or lost from the housing stock by the conversion of an existing building's use, such as from commercial space to housing.

Since 1990, 306 units have been added to the City's housing stock by some type of alteration (net change). The majority of alterations that produce additional housing usually result in a single new unit. Additionally, a small number of units are removed from the housing stock each year due to City code abatement. A total of 494 housing units were removed in this fashion from 1991-2000. A total of 12 units were lost due to code enforcement in 2000.

The number of housing (excluding live/work units) units lost by conversion to non-residential uses has decreased dramatically over the last thirty years. Approximately 40 units were lost to such conversion from 1991-2000, whereas over 1,000 units were converted to non-residential uses in the decade from 1970-1980 (Table 22). The reduction in the number of converted units stems from regulations that discourage the loss of residential units to commercial uses. These regulations do not apply to live/work units.

No information is available on the number of units illegally converted to non-residential use.

TABLE 22***Housing Units Converted to Non-Residential Use***

Housing Units Converted to Non-Residential Use	
1970 to 1980*	1,094
1981 to 1990**	165
1991 to 2000**	42
* A Study of Conversion of Apartments to Non-Residential Uses in Commercial and Industrial Areas, DCP, 1981	
** Housing Inventory, 1981 - 2000	

8. Residential Hotel Stock

Residential hotel units (also “SRO” or Single Room Occupancy) often refer to rooms for single occupancy that are generally rented to lower income persons. There are 518 residential hotels in San Francisco containing 19,645 residential rooms (Table 23). Sixty-one of these hotels are operated by nonprofit organizations, representing 17% of all residential rooms in the City (3,314 rooms). Roughly 19% of all units in for profit residential hotels are tourist rooms.

The conversion of residential hotel rooms has significantly decreased from the conversion rate of the 1970s due, in part, to the adoption of the Residential Hotel Ordinance in 1980, and subsequent amendments to that ordinance strengthening its enforcement in 1990. Just over 900 SRO units were lost in the last eleven years, largely due to several significant fires, as compared to the 410 units lost due to conversion, demolition, or damage from 1981-1989 (Table 24). Prior to 1981, residential hotel rooms in San Francisco were being lost at a significant rate, as the SRO stock decreased by 4,883 units from 1975-1980. The loss of SRO units may in fact be greater than the figures reported, as it is difficult to track illegal conversions and units lost because of small scale damage.

TABLE 23***Status of Residential Hotels in San Francisco***

	Residential Hotels			Non-Profit Residential Hotels			Total		
	No. of Bldgs	Residential Rooms	Tourist Rooms	No. of Bldgs	Residential Rooms	Tourist Rooms	No. of Bldgs	Residential Rooms	Tourist Rooms
1990	495	18,521	4,449	36	1,831	-	531	20,352	4,449
1995	496	18,415	4,457	36	1,481	-	532	19,896	4,457
2000	457	16,331	3,781	61	3,314	-	518	19,645	3,781

TABLE 24***Loss of Residential Hotel Rooms***

	1975 - 1980	1980 - 1981	1981 - 1989	1990 - 2000
Demolitions/Fire	985	-	99	909
Conversions	2,710	1,188	109	-
Earthquake Damage	-	-	202	-
TOTAL	3,695	1,188	410	909

9. New Construction of Low and Moderate Income Housing

From 1990-2000, 3,492 new affordable housing units were constructed in San Francisco, 62% of which qualified as affordable at very low income levels and 30% that was considered affordable for low income households (Table 25). An affordable rental unit is defined as housing for which rent equals 30% of the income of a household earning 80% or less of San Francisco's median income. As calculated for the Census Bureau's 1999 American Community Survey, the area median income in San Francisco County is \$47,962. An affordable ownership unit is one for which all housing payments equal 33% of the gross income of a household earning between 80-100% of area median income.

Since 1990, 28% of all new housing in the City have been affordable units. Over the last five years, a total of 1,339 new affordable units were produced, representing roughly 24% of all new housing units produced during that time. These totals represent construction of new units, but do

not include affordable units produced as a result of acquisition and rehabilitation of existing buildings by nonprofit housing organizations. Such housing rehabilitation projects are included in the altered units category of changes to the housing stock.

Fifty-nine percent of all affordable units produced from 1996-2000 targeted very low and extremely low income households, those earning less than 50% of area median income. Family units comprised the largest portion of affordable housing produced in the last five years, totaling 61%.

TABLE 25
New Construction of Low and Moderate Income Units, 1990-2000

New Construction of Low and Moderate Income Units (1990 - 2000)											
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Very Low	278	203	16	108	686	82	83	287	213	136	67
Low	180	154	180	-	86	80	198	46	21	41	54
Moderate	-	32	54	-	4	10	63	36	-	63	31
Total Newly Constructed Affordable Units	458	389	250	108	776	172	344	369	234	240	152
As % of Total New Construction	22.2%	20.7%	32.6%	28.5%	62.9%	32.3%	37.8%	40.7%	25.7%	19.6%	9.3%

10. Federally Assisted Units

Table 26 describes units in San Francisco that receive support under the federal Section 8 rent subsidy program, or are managed by the San Francisco Housing Authority. In the Section 8 program, residents pay 30% of their monthly income in rent, and the government subsidizes the difference so that the property owner receives a HUD-determined fair market rent each month. Section 8 subsidies are associated either with a particular housing unit (project-based) or with a qualifying household (voucher/certificate program).

Section 8 housing units, and those managed by the Housing Authority total almost 21,000 units, representing over 6% of the city's total housing stock. Senior and disabled renters that meet the

income eligibility requirements are given priority on roughly a third of all Housing Authority units, while the remaining units are predominantly occupied by family households. Almost half of all residents in Housing Authority units are African-American and approximately one-fifth are Asian-American.

The San Francisco Housing Authority total in Table 26 does not include 661 formerly managed units that have been recently demolished as part of the federal HOPE VI rehabilitation program. The HOPE VI funds will support the rehabilitation of units at five former Public Housing Authority projects, and will result in over 1,200 upgraded units of affordable housing, 234 of which are already completed.

TABLE 26
Citywide Inventory of Public Assisted Housing

	2000		
	Total No. of Units	Elderly Units	Family Units
Project Based Section 8			
For profit	4,085	n/a	n/a
Non-profit	3,957	n/a	n/a
Tenant Based Section 8	6641*	n/a	n/a
SF Housing Authority	6,096	2,025	4,071
TOTALS	20,779	2,025	4,071
*Total includes 909 Project-based units administered by SFHA			
Source: San Francisco Housing Authority and Redevelopment Agency			

B. AFFORDABILITY

1. Owner-Occupied Housing

San Francisco's housing prices are among the highest in the nation. In 2000, the average price for a 3 bedroom home in San Francisco stood at over \$540,000, 30% higher than the Bay Area average. It is estimated that only 11% of San Francisco's households can afford a median priced

home in the City. Statewide, just over 30% of households in California can afford the median home sales price.

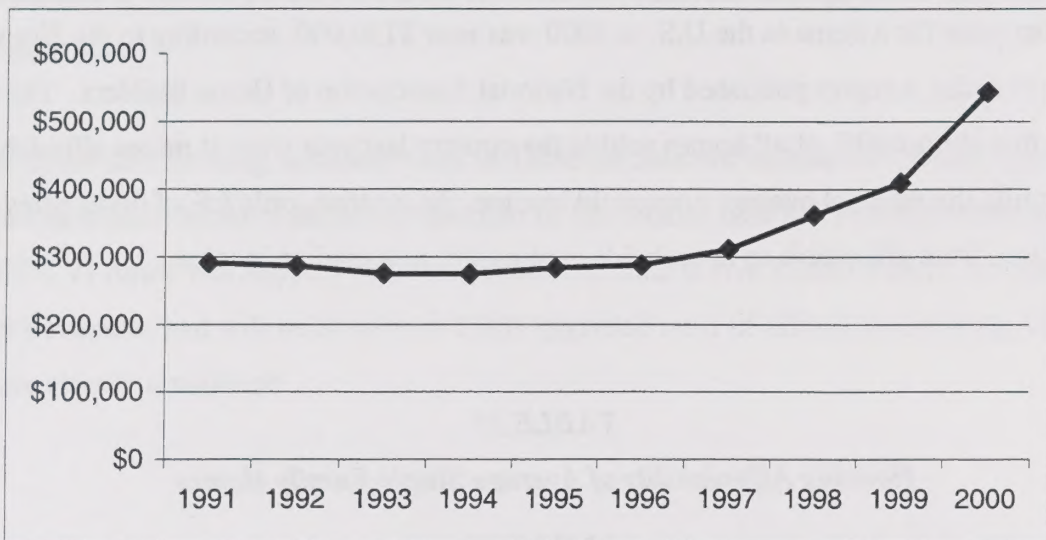
The median price for a home in the U.S. in 2000 was near \$150,000, according to the *Housing Opportunity Index*, a report published by the National Association of Home Builders. The report estimates that almost 60% of all homes sold in the country last year were at prices affordable to a family earning the national average household income. In contrast, only 6% of home sales in San Francisco were affordable to households earning the area median income.

TABLE 27
Housing Affordability of Average Single Family Homes

	Median Price	Percent of Households Qualifying
San Francisco	\$540,000	11%
SF Bay Area Region	\$470,000	18%
Northern California	\$200,000	35%
California	\$250,000	32%
Nationwide	\$151,000	56%
Source: California Association of REALTORS		

Graph 5 depicts the rapid increase in housing prices in San Francisco over the past ten years. The average price of a three bedroom house in San Francisco has increased by 86% since 1991, while the average price of a house Bay Area wide spiked 56% in the same ten years. This dramatic increase is largely due to rising home prices in the last five years. Average home prices actually fell 2.7% in San Francisco from 1991-1995 and dropped 3.5% Bay Area wide over those five years. The high cost of home ownership is generally prohibitive for San Francisco's low and moderate income households, and homeownership for these households requires substantial subsidies.

GRAPH 5
Housing Price Trends



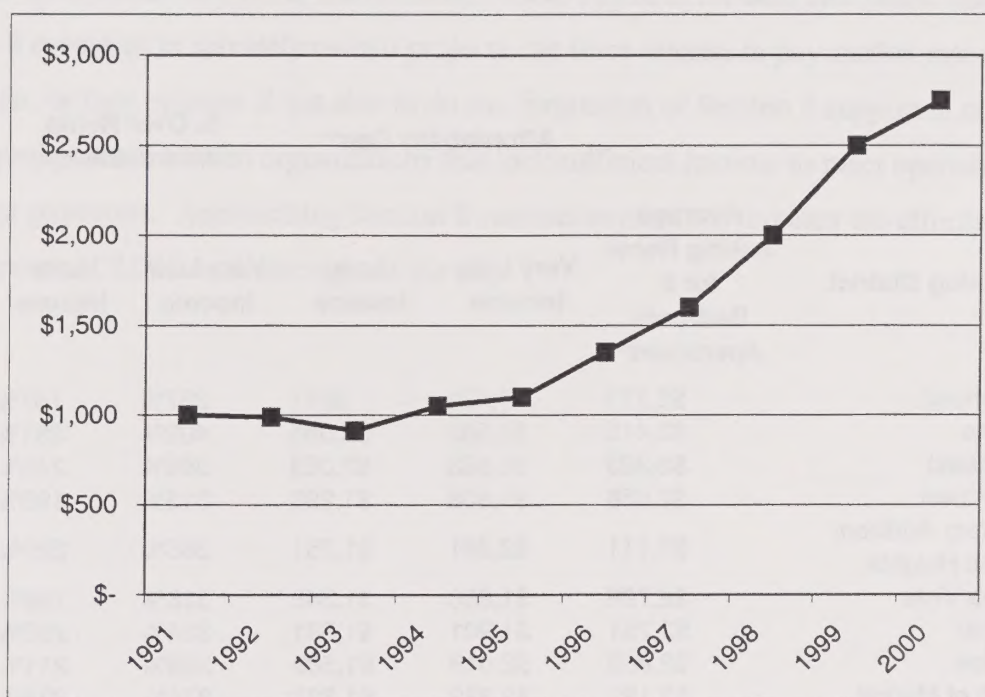
*(figures in current dollars)

2. Rental Housing

According to the U.S Census Bureau's American Community Survey, in 1999, 39% of San Francisco residents own their homes, while 61% are renters. The rate of homeownership has increased slightly since the 1990 census, though it is still much lower than the national average of 69%.

Rents in San Francisco increased dramatically over the past decade, as job growth outpaced housing development and housing demand remains high in the City. Average housing rents in San Francisco increased a staggering 175% from 1991-2000, and have risen by almost 21% per year since 1996. The average monthly rent for a two bedroom apartment in 2000 registered at \$2,750. To be able to afford this level of rent, a household would need to earn approximately \$110,000 a year. It is estimated that only 17% of San Francisco households earned over \$110,000 in 1999.

GRAPH 6
Rental Housing Price Trends



*(figures in current dollars)

Rental affordability is a problem in all the residential districts of the City, as shown in Table 28. Rent levels shown in the table are average asking rents for market rate rental housing. The totals do not include rent figures on currently occupied units, or publicly assisted housing.

Based on the units surveyed, neighborhoods in the south central and eastern portions of the city are the most affordable, in addition to parts of the Richmond and Sunset Districts. Even in these more affordable neighborhoods, the affordability gap for low and very low income households is still significant. The least expensive average asking rent by district (\$2,105) is still over 150% greater than what a low income household can afford.

TABLE 28

Rental Affordability for Lower Income Households by Planning District

Planning District	Average Asking Rents for 2 Bedroom Apartment*	Affordability Gap**		% Over Rents Affordable by	
		Very Low Income	Low Income	Very Low Income	Low Income
Richmond	\$2,271	\$1,421	\$911	267%	167%
Marina	\$3,415	\$2,565	\$2,055	402%	251%
Northeast	\$3,383	\$2,533	\$2,023	398%	249%
Downtown	\$2,658	\$1,808	\$1,298	313%	195%
Western Addition/ Pacific Heights	\$3,111	\$2,261	\$1,751	366%	229%
Buena Vista	\$2,706	\$1,856	\$1,346	318%	199%
Central	\$2,751	\$1,901	\$1,391	324%	202%
Mission	\$2,869	\$2,019	\$1,509	338%	211%
South of Market	\$3,182	\$2,332	\$1,822	374%	234%
South Bayshore	\$2,233	\$1,383	\$873	263%	164%
Bernal Heights	\$2,604	\$1,754	\$1,244	306%	191%
South Central	\$2,105	\$1,255	\$745	248%	155%
Ingleside	\$2,315	\$1,465	\$955	272%	170%
Inner Sunset	\$2,475	\$1,625	\$1,115	291%	182%
Outer Sunset	\$2,387	\$1,537	\$1,027	281%	176%
Citywide Average	\$2,700	\$1,850	\$1,340	317%	198%

*Market Rent Source: METRORENT

** Affordability Gap Is The Rent Over What Is Affordable For A Household Of Two, Per 2001 HUD Affordability Limits

3. Loss of Publicly Assisted Units

Through contracts managed by the San Francisco Redevelopment Agency, the federal project based Section 8 program subsidizes rent on over 8,000 units of affordable housing in the city. Almost half of these units are in projects owned or managed by nonprofit organizations. Section

8 units receive Federal subsidies that provide the owners of these units with the difference between 30% of the tenant's income, and a HUD established rent for the units.

Table 29 shows Section 8 units with contracts set to expire in the next few years. Expiration of Section 8 subsidies in privately owned projects can force tenants to pay market rate rents for their units, or face eviction if not able to do so. Expiration of Section 8 support in nonprofit owned projects will burden organizations that lack sufficient income to meet operating costs and mortgage payments. Approaching Section 8 contract expirations threaten the affordability requirements of 2,025 units throughout the city.

Project Name		Address		City		County		State	
Project Name		Address		City		County		State	
Project Name		Address		City		County		State	
Project Name		Address		City		County		State	
Project Name		Address		City		County		State	
Project Name		Address		City		County		State	
Project Name		Address		City		County		State	
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Project Name		Address		City		County		State	

TABLE 29

**Expiration and Opt-Outs of Project Based Section 8 Contracts:
Buildings at Risk, 2000 to 2005**

Project	Owner	[1]	First Expire [2]	Units [3]	Flex [4]	LIHPRHA [5]	Rent Control
<u>Bayview-Hunters Point</u>							
ALL HALLOWS GARDEN APTS	LD		9/30/96	155	Yes	No	Yes
BAYVIEW APARTMENTS	LD		9/30/96	146	Yes	No	Yes
JACKIE ROBINSON GARDENS	LD		8/31/96	130	Yes	No	Yes
LA SALLE APARTMENTS	PM		10/16/97	145	No	No	Yes
RIDGEVIEW TERRACE	LD		9/10/96	101	No	No	Yes
SHOREVIEW APARTMENTS	PM		1/8/98	156	No	No	Yes
<u>Diamond Heights</u>							
CASA DE VIDA	PM		12/14/01	21	No	No	No
<u>Hayes Valley</u>							
FAIR OAKS APARTMENTS	LD		7/20/21	20	No	Yes	Yes
MERCY TERRACE	PM		11/29/03	158	No	No	Yes
<u>Ingleside</u>							
PAGE/HOLLOWAY APARTMENTS	PM or LD		12/15/20	15	No	No	No
<u>Mission</u>							
MARIPOSA GARDENS APTS.	LD		9/19/03	63	No	No	No
MISSION BART APARTMENTS	PM		10/20/13	13	No	No	No
MISSION PLAZA APARTMENTS	PM		7/14/00	132	No	No	No
<u>North Beach</u>							
WHARF PLAZA I	PM		4/5/02	116	No	No	No
WHARF PLAZA II	PM		6/15/02	114	No	No	No
<u>Richmond</u>							
OCEAN BEACH APARTMENTS	PM		4/25/04	85	No	No	No
<u>Tenderloin</u>							
ASPEN TENDERLOIN APT	LD		12/1/03	82	No	Yes	Yes
CRESENT MANOR	LD		10/31/96	92	Yes	No	Yes
LASSEN APARTMENTS	PM		6/21/03	81	No	No	Yes
PADRE APTS-NSA	LD		7/30/21	41	No	Yes	Yes
SERENITY TOWERS	PM		4/3/03	72	No	No	No
<u>Western Addition</u>							
EMERIC-GOODMAN BUILDING	LD		12/19/04	30	No	No	No
NAMIKI APTS	PM		8/9/99	33	No	No	No
UNIVISTA APARTMENTS	LD		8/31/97	24	Yes	No	Yes
Total				2025			

[1] LD = Limited Dividend, PM = Profit Motivated

[2] First expiration of Section 8 Contract, typically 20 years after origination. Contract is renewed annually each year thereafter.

[3] Units receiving project based Section 8 subsidy.

[4] Flexible Subsidy Use Agreement: HUD rehabilitation loan program that provided funds to owners in exchange for a no-prepayment provision, and increased Section 8 contract rent levels to cover new debt

[5] Low Income Housing Preservation and Resident Homeownership Act: Provided federal funds to purchase at-risk properties and extend affordability requirements for an additional 30 years

Source: San Francisco Redevelopment Agency

C. VACANCY

The overall housing vacancy rate in San Francisco fell over the past ten years. About 5% of the City's housing stock is not occupied at any given time. Almost 3,800 of all vacant housing in 2000 (or 1.1% of all housing units) are second homes for families with another primary residence, time shares, or corporately owned and utilized for employee housing.

TABLE 30
Vacancy Rate

	1970	1980	1990	2000
Total Housing Units	310,674	316,608	328,471	346,527
Occupied	295,484	298,956	305,584	329,700
Vacant	4.89%	5.58%	6.97%	4.86%
For Rent Vacant	3.17%	2.68%	3.71%	2.50%
For Sale Vacant			0.56%	0.80%
Source: U.S. Census				

Note: The U.S. Census 2000 total housing unit count exceeds the S.F. Planning Department housing unit total as the Census take into account illegal secondary housing units.

III. HOUSING NEEDS

This section examines the type, amount and affordability of new housing construction needed in San Francisco through June 2006. It is based, in part, on the data presented in the preceding Sections I and II.

A. OVERALL HOUSING NEED

The Association of Bay Area Governments (ABAG), as required by State law, has determined San Francisco's share of new residential construction by income categories. San Francisco's share of the regional housing need for 1999 through June 2006 was computed as 20,374 units, or 2,717 units per year. The housing goals seek to alleviate a tight housing market due to household growth and to accommodate at least 50% of new workers. San Francisco would need a total annual housing production rate of 2,852 units through June 2006 to achieve a 5% vacancy rate over the City's housing need.

TABLE 31

ABAG Housing Needs Assessment

Housing Needs Estimate (1999 to June 2006)

Housing Need Related to Household Growth	6,449
Housing Need Related to 50% Commute Reduction	13,925
	20,374
Annual New Housing Construction to Meet Housing Need	2,717
Annual New Construction to Meet Housing Need and Increase Vacancy Rate to 5%	2,852

B. HOUSING NEEDS OF SPECIAL POPULATION GROUPS

Various population groups warrant particular attention because the housing market has not adequately meet their needs. These groups include the homeless; the mentally ill; the disabled; the elderly; families with children; students; immigrants and refugees; persons with AIDS; and artists. These population groups are not mutually exclusive and their needs may overlap. For example, it is estimated that 39% of the homeless suffer from mental illness; as many as 23% of the elderly have mobility or self-care limitations; and immigrants and refugees have extended families. Between 60 to 80% of all homeless individuals may suffer from one or more physical disability, mental illness, or substance addiction. More detailed information on the housing needs of these specific populations can be found in the *2000 Consolidated Plan* (Comprehensive Affordable Housing Strategies, Mayor's Office of Housing, November 2000).

1. Homeless

Estimates of the homeless population in San Francisco range from 5,400 to 12,500 persons. The Mayor's Office on Homelessness counted 5,376 homeless persons on the streets and in homeless shelters on the evening of October 27, 2000. The first of their bi-annual tally, conducted on April 27, 2000, accounted for 3,610 homeless people. The Local Homeless Coordinating Board, assisted by the Department of Human Services, estimates the number of homeless to be 9,375 homeless individuals and 3,125 in homeless families.

TABLE 32

*Estimated Homeless Population in San Francisco***Estimated Homeless Population in San Francisco, October 27, 2000 Survey**

Homeless Shelters	1,504
Living on the Streets	2,033
Family Shelter, Emergency Housing	565
Treatment Programs, County Hospital, County Jail	1,274
Irregularly Housed	
TOTALS	5,376

Sources: Mayor's Office on Homelessness

The following brief profile of the homeless is based on various surveys. While not comprehensive, it nevertheless underscores the multiplicity of their housing needs:

- Most homeless are single adults, predominantly male (about 68%), between 31 and 50 years old (65%). African-Americans represent a disproportionate number of this homeless population (42%). Lack of income or loss of a job were most cited as the primary cause of homelessness; with a significant numbers unable to work because of physical disability (15%) or mental illness (11%). Over half have reported abusing drugs and/or alcohol.
- Homeless families are a growing segment of the City's homeless population, although they may not be as visible as the adult males living on the streets. Most are most likely to be led by a single-parent (70%), with women as primary givers (90%). As many as 58% in homeless families are children, and half of these children are under five years old. Homeless families are also disproportionately African-American (43%). Almost three-quarters were experiencing homelessness

for the first time and over half report having a history of domestic violence. The main source of income for primary care givers in most homeless families is the federal Aid for Families with Dependent Children (AFDC) program. Substance abuse also plagues homeless families, with over a third of primary caregivers reporting the use of drugs or alcohol.

- Over three-quarters of the homeless youth (10 to 21 years old) are under 18 years old and many (62%) do not have the option of returning home due to physical, emotional or sexual abuse, or the inability of the family to provide for the youth due to substance abuse or poverty. Homeless youth are often without viable means of support and as minors, have little access to benefits. They are also likely to have limited job skills and are vulnerable to substance abuse, survival sex, and exposure to HIV.

Homelessness can be set off by other factors. The significant regional economic growth of the last few years has intensified the City's already tight housing market, leading to what can be described as an affordable housing crisis. Not all residents of San Francisco benefited from the economic boom of the last few years. In 1999 rental vacancy rates dipped to less than 2%, and asking rent prices averaged \$2,016 for a two-bedroom apartment. In such conditions, unexpected displacement or eviction can be devastating to the estimated 10% of all families in City earning less than \$17,000 a year, roughly the national threshold for poverty.

Homelessness can also be a measure of the failure to provide affordable housing. The production of 3,490 affordable housing units from 1990 through 2000, in addition to the rehabilitation of almost 4,000 single-room occupancy residential hotel units (SROs), barely meet the needs of households earning less than 50% of the area's median income.

2. Mentally Ill

San Franciscans with severe psychiatric disabilities often have extremely low incomes and are consequently forced to live in substandard housing, with no supportive services

and assistance that would allow them to live independently. De-institutionalization of the state's mental institutions in the late 1970s left the charge and housing of the City's psychiatrically disabled residents to private board and care facilities. However, the 1,278 board and care beds available for psychiatric patients in San Francisco in 1977 shrunk to 465 by 1995.

In 1999, licensed board and care facilities in San Francisco managed 525 beds for San Francisco's mentally ill, although the growing costs of patient care may again reduce the modest gain in out-patient service. At current supplemental security subsidy levels, operators are finding the provision of board and care for the mentally ill financially unattractive.

A survey conducted by the San Francisco Mental Health Association indicated an overwhelming desire on the part of mentally disabled persons to live alone or with one to two friends in apartments with support services as needed. The absence of affordable housing linked to supportive services, however, sends many of the City's mentally ill through a never-ending loop of acute care and/or homelessness. The Department of Public Health's Division of Mental Health estimates a need for 2,000 supportive housing units for San Francisco's mentally ill.

3. Physically Disabled

Accessible housing is housing with special design features that accommodate people with physical disabilities; for example, the height of cabinets, the positioning of electrical outlets, the layout of fixtures and appliances, and wide interior spaces for wheelchair circulation. However, with over three-quarters of San Francisco's housing stock built before 1950, much of the City's housing has narrow corridors and doorways, steps leading to building entrances, and multiple stories without elevators – all presenting barriers to people with disabilities.

The Northern California Council for the Community estimates that 63,032 San Franciscans are physically disabled (*Building a Healthier San Francisco: A Citywide*

Collaborative Community Assessment, 1999). The 1990 Census also counted 22,962 non-institutionalized adults as having mobility problems and who would need accessible housing units. San Francisco has a high percentage of elderly and other households that require housing that is accessible to the disabled. While no estimates of unmet need for accessible housing are available, an assumption that 20% of physically disabled persons between the ages of 16 and 64 earn less than 50% of the area's median income would create a need for 3,177 accessible affordable housing units.

4. Elderly

The 2000 Census counted 136,369 or 18% of San Francisco's population as 60 years or older. This elderly population is expected to grow to 173,200 by 2010. The recent Census also estimated that 24% of all San Francisco households have one or more persons over 65 years old. About 32,300 elderly householders, representing about 10% of all households in 2000, lived alone.

Senior citizens have different housing needs especially as they develop health problems or experience decreased mobility. The U.S. Census Bureau estimates that 23% of persons 65 and over have mobility or self-care limitations. The Long-Term Care Pilot Project Task Force estimates that the City must develop a minimum of 1,500 units of affordable supportive housing. Older and disabled adults who require long-term care have a need for a broad range of on-site and off-site services including central dining, transportation services, limited or complete medical care, recreational and other services. For seniors living independently, there is a need for small, safe, easily maintained dwelling units.

5. Low Income Ethnic Communities

Low income households in communities of color have often been at particular disadvantage in the housing market. The need here is for rehabilitation and affordability assistance for those living in the existing housing stock as well as new construction.

6. Families with Children

Families with children need housing with sufficient number of bedrooms to prevent overcrowding, a challenge in San Francisco as the City's housing stock tends to have small numbers of bedrooms. The 2000 Census estimated that 145,200 or about 44% of all San Francisco households are family households. Of these family households, 54,700 or 38%, include children. However, 63,900 households, or almost one in five San Francisco households, include a person under 18 years of age. Over 11,300 family households, or 3%, are headed by a single mother.

The Census also showed that average family household size, at 3.22 persons per household, is significantly larger than the average for all households (2.30 persons per household). Household growth projections from ABAG, adjusted to U.S. Census 2000 data, estimate that household size will stabilize at 2.28 by 2010. In 1990, the average number of people per household was estimated to be 2.29.

Based on the wait list managed by the San Francisco Housing Authority, there is an estimated need of over 4,000 affordable housing units for low-income families. This need breaks down to about 3,450 three-bedroom units, 450 four-bedroom units, and 150 five-bedroom units.

7. Low Income Single Persons

A sizeable number of San Francisco households are composed of single persons. In 1999, 37% of the households were single persons, down from 39% in 1990 and 41% in 1980. As cited elsewhere in this report, high costs of housing increasingly forces individuals to share housing.

Many low income, single person households are housed in single room occupancy residential hotels (SROs). While the rate of loss of residential hotel units has diminished in the last decade, the stock of low-income residential hotel units is still being slowly depleted.

8. Students

The University of California Medical Center has a student enrolment of 3,780. The university's Aldea San Miguel Family Housing accommodates 130 students who are married and/or have full-time legal custody of a dependent child. The Turk Boulevard Apartments houses 65 students, while the Avenue Houses have rooms for 113 students.

San Francisco's State University had a student enrollment of 26,800 in 2000. The campus has 1,500 student housing units.

While enrollment at San Francisco City College's Phelan Campus totalled 25,000 students in 2000, it provided no student housing. Owner-occupied single family housing surrounds the campus and its students commute from all parts of the City. Increasingly, more international students are attending San Francisco City College. Based on its student housing placement program, it is estimated that there is a need for about 1,000 units to house this student population more adequately.

9. Immigrants, Refugees and Undocumented Workers

San Francisco has long been a "Port of Entry" to the United States for immigrants and refugees. Legal immigrants come from various countries for which the U.S. government has established numerical quotas and preference categories related to relatives already in the United States. Refugees come from certain areas that the U.S. government designates as warranting opportunity for political asylum. They are eligible for various forms of Federal aid. San Francisco also shelters a number of undocumented persons who are in the United States without legal status. Many of these new arrivals need low cost housing and support services; many of which are centered in San Francisco.

Shelter providers for the homeless have also assisted homeless persons who are undocumented. These persons have an urgent need for shelter because they are ineligible for public assistance programs such as General Assistance. Most immigrants and refugees, regardless of immigration status, also need housing services that are provided in a multicultural and multilingual context.

10. Persons with AIDS and Terminally Ill Patients

Residential needs of persons with AIDS range from independent living to home care and hospice services. The San Francisco Five-Year HIV/AIDS Housing Plan Update estimated that there were over 7,960 people with AIDS living in the City. Thirty-eight percent of them are low income. Current available resources do not meet the need for supportive housing for people living with AIDS. As many as 3,000 are on the HIV/AIDS Housing Waitlist.

11. Artists/Artisans

Artists have special housing needs for affordable accommodations that provide large wall space, high ceilings, lofts, lighting, and the ability to work at all hours of the day or night. There is high demand for such flexible space in the city, as many of San Francisco's artists live in apartment units not suitable for such activities. It was estimated that about 60% of San Francisco artists are lower income households, earning less than \$25,500 a year in 1990.

"Loft" units, or live/work spaces, were once attractive options for artists seeking such flexible accommodations. Live/work units frequently stemmed from converted industrial building space, with minimum retrofitting intended to maintain the unit's affordability. Newly constructed live/work units became very popular with the building community and prospective homebuyers in the latter part of the 1990s, and over 2,100 units were completed since 1990. However, these units have sold and rented at levels far out of reach of most artists, and it is estimated that little of the demand for flexible artist space has been met by these new units.

C. SUMMARY OF NEEDS OF SPECIAL POPULATION GROUPS

The needs of specific population groups are summarized below. Needs for these groups can often overlap, including certain housing needs.

TABLE 33
Housing Needs of Special Population Groups

Housing Needs of Special Population Groups		
Population Group	Type of Housing Units Needed	Units
Homeless	Shelters, transitional housing, SROs, Small and Large Family	3,500
Mentally Ill	Board and Care, Institutional Facilities	2,000
Physically Disabled	Accessible Units of all Types	3,177
Elderly	Senior Housing Projects, Studios, 1 Bedroom	1,500
Low Income Minorities	Elderly, Small and Large Family	*
Families with Children	2 or more Bedroom Family Housing	4,000
Low Income Singles	SROs, Studios, 1 Bedroom Units	*
Students	Dorms or Studios	1,000
New Immigrants	Small and Large Families	*
Terminally Ill Patients	Board and Care, Institutional Facilities	3,000
Artists	Affordable Live/Work Space	1,500

*no numbers available for those marked

D. HOUSING PRESERVATION NEEDS

San Francisco has an older housing stock, with 75% of all units over 50 years old. This is the largest concentration of older housing stock in the state.

1. Private Housing Rehabilitation

Unassisted Housing Rehabilitation

Housing restoration, remodeling and maintenance is an on-going activity through the City. Renovation projects completed between 1990 and 1995 totaled 11,464, affecting 90,055 units. Between 1996 and 2000, these numbers dropped to 5,533 projects with 34,577 units. However, issuance or approvals of alteration permits are again increasing. In 2000, the Department of Building Inspection approved or issued permits for 1,924 alteration projects affecting 20,220 units.

According to San Francisco Department of Building Inspection staff, serious rehabilitation needs are likely to be concentrated in the one, and two unit structures, rather than in larger multi-family structures. This is borne out as over 86% of projects in the last decade were for residential improvements in one- and two-unit buildings. A high rehabilitation need is also evident in many lower income multi-unit buildings and residential hotels.

2. Public Housing Rehabilitation

There are 6,252 public housing units in 47 developments scattered throughout the City. Even with the current occupancy rate of 98%, vacated units need to be rehabilitated before they are re-rented. Immediate capital improvement needs for public housing units amount to \$19,672 per unit. Recent and current San Francisco Housing Authority programs will have revitalized 1,023 low-income and 205 moderate income units by 2003.

3. Seismic Retrofitting

There are approximately 11,850 units in 399 unreinforced masonry (UMB) residential hotels and apartment buildings, most of which are occupied by low income households. It is estimated that up to \$20,000 per unit of public subsidies are needed to rehabilitate and seismically upgrade these buildings and still maintain the low income rent structure in these units. These costs would depend on the type of building, the level of retrofit, and the availability of construction expertise. Then they are retrofitted, their occupants and other residents of the area will be less vulnerable to earthquakes.

In addition to the unreinforced masonry buildings much of San Francisco's older housing stock needs some sort of seismic upgrading, including bolting foundations and structural reinforcement.

E. REPLACEMENT OF LOST UNITS

Demolitions, abatement enforcement, mergers, and conversions diminish the City's housing stock. Units lost need to be replaced. The table below anticipates losses based on the previous trends.

TABLE 34
Replacement Housing Needs

Replacement Housing Needs	
Demolition and Replacement	1,500
Loss of Secondary Units	400
Unit Mergers	200
Conversion to Commercial Use	30
TOTAL	2,130

1. Loss of Units Through Building Demolition

Since 1990, building demolition has accounted for the loss of about 1,540 units. The unusually high numbers of units demolished in 1990 could be attributed to earthquake

damage, while the demolition of some large public housing projects account for the substantial numbers in 1996 and 1997 respectively. New construction has since replaced much of the torn-down public housing projects.

2. Loss of Units Through Mergers

A slight decline in dwelling unit mergers followed the imposition of controls to the combining of two units into one larger unit in 1995. Between 1990 and 1995, 237 units, or an average of 40 a year, were lost. However, in the last five years (1996 through 2000), only 192 units were merged to make larger dwelling units, a loss of about 38 units a year.

3. Loss of Illegal Secondary Units Through Code Enforcement

The total number of illegal, predominantly secondary, units has been estimated to be about 25,000. While many illegal secondary units may not meet existing code requirements, they constitute major supply of affordable housing. Some types of illegality, such as excess number of units permitted under zoning regulations, basement units with substandard ceiling heights, or units with severe egress problems cannot be remedied except by removal.

Between 1990 and 2000, 540 illegal secondary units were removed. The volume of complaints has been increasing and it is estimated that in the future, 50 to 100 units per year will be removed because of code enforcement action. Based on a projected average loss of 75 units per year, it is estimated that about 400 units would be needed by June 2006 to replace these units.

4. Loss of Units from Conversions to Commercial Use

Fifty housing units were legally converted to commercial uses between 1990 and 2000. While the conversion of residential use to commercial uses has declined significantly from the high rates experienced in the late 1970s, illegal conversions are still a concern in a number of areas. Unfortunately, no reliable data can detail the extent of illegal

conversions. But based on trends in the previous decade, at least 30 new housing units would be needed to replace housing lost to conversion to commercial use.

F. HOUSING AFFORDABILITY NEEDS

1. Affordability of New Housing Construction

State law requires that the City address the housing needs for all income levels. ABAG has developed an estimate of housing need by income group to serve as a basis for determining what income levels need to be served in new construction. The ABAG figures are based on income distribution of all existing households in the City and in the Bay Area region. The ABAG figure splits the difference between the City and the regional figure in an effort to move the City closer to the regional income distribution.

TABLE 35

***New Construction Housing Need by Income Category
(1999- June 2006)***

	RHND* Allocation	Percentage
Very Low	5,244	25.7%
Low	2,126	10.4%
Moderate	5,639	27.7%
Above Moderate	7,363	36.1%
TOTAL	20,372	100.0%
*Regional Housing Needs Determination		

The high cost of housing leads to numerous troublesome effects including overwhelming rent burden as more of a household's income is needed to go toward rents; household overcrowding as more people squeeze into smaller affordable units or to share costs; an increase in workers per household needed to pay mortgage or meet monthly rent

payments, increased commuter traffic from San Francisco job holders who cannot afford to live in the City; and an increase in the homeless population.

2. Households Overpaying

According to the 1998 American Housing Survey, approximately 25% of all San Francisco households spent at least half their income on housing. Homeowners were likewise bearing the high costs of housing, with about 17% paying over half their income on housing. This same survey estimated that one in six renting household was living below the poverty line while about 8,300 or 8% of all homeowners were in the same circumstances.

3. Overcrowded Households

High housing costs have forced overcrowding. To afford the cost of housing, many low-income families crowd into small units. In some cases, two or three families are crowded into a two- or three-bedroom apartment or flat. The 1990 census reported 18,995 overcrowded units with more than 1.5 persons per room. By 1998, about one in five housing unit had more than 1.5 or more people per bedroom, according to the 1998 American Housing Survey.

Renting households also tend to be more overcrowded than households that own their homes: 30% of all renting households are characterized as overcrowded, compared to 11% of home-owning households. The 2000 Census is expected to show even more overcrowding.

4. Expiration of Subsidized Section 8 Rental Housing and Mortgage Subsidies

As shown on Table 29, over 2,000 low income units will lose their Federal Rental Section 8 subsidies by 2005. A total of 3,300 units are subject to Federal mortgage expiration.

IV. INVENTORY OF LAND SUITABLE FOR RESIDENTIAL DEVELOPMENT

This section describes the City's inventory of land suitable for residential development and assesses the housing development potential of that land.

A. POTENTIAL HOUSING SITES

Although San Francisco is already highly developed, there is still a substantial amount of undeveloped or underdeveloped land that is suitable for in-fill residential development. An inventory of sites suitable for residential development identified some 631 acres of land on which about 37,700 units of new housing could be built.

The housing opportunity estimates in Table 36 represents the maximum permitted residential development capacity in the City's undeveloped and underdeveloped lands. Many of these sites border transit-preferential streets and neighborhood commercial districts, where about 30,400 new units can be constructed. This general estimate of the City's total housing potential was determined without specifying which sites may or may not get constructed in the next five years.

Planned area developments in Mission Bay, Hunters Point Naval Shipyard and the Transbay Terminal include 14,800 new housing units. How rapidly these sites are developed depends upon the availability of private and public resources and market demand.

TABLE 36
Estimates of Housing Potential

HOUSING POTENTIAL ESTIMATES	
	No. of Potential New Units
Industrial Areas (not including Mission Bay and South Bayshore)	3,699
Downtown	9,437
Marina Fillmore	3,175
Northeast	1,780
South Bayshore	1,893
Transbay (not including Terminal)	9,409
Transit Corridors	6,069
Rest of City	2,505
TOTAL	37,967
Mission Bay	6,000
Hunters Point	1,800
Transbay Terminal	7,000
TOTAL CITYWIDE HOUSING POTENTIAL	52,767

1. Housing Potential Sites: Terms and Methodology

The housing potential estimates in Tables 36 through 38 are based on an inventory of existing uses citywide. The terms used in these tables are explained below:

Housing Potential Sites: These are sites that are suitable for residential development based on criteria and site analysis of each site. They consist of “undeveloped” and “soft sites” determined appropriate for residential development based on preliminary street surveys of such factors as proximity to residential districts, transportation, parks, potential hazardous waste problems, and views.

Undeveloped Land: Includes unimproved or undeveloped vacant lots used for open storage, parking, or other open uses. These sites theoretically could be readily developed for residential use.

Soft Sites: A second category of housing potential sites which include sites with older, obsolete buildings, unsafe buildings, and building and uses which underutilize the site. These sites have structures that could be reused or rebuilt for residential use.

Build-Out Capacity: This is the theoretical build-out capacity if undeveloped and underdeveloped sites are built at currently permitted residential densities.

Land use data for each site were compiled from Assessor's Records and field survey conducted for the Better Neighborhoods 2002 program areas, the industrial protection zone and mixed use housing zone land use study, and select transit-oriented neighborhood districts. Land use data compiled for each site included building square footage, type of use, open space, number of stories, height, zoning, lot area, floor area ratio, census tract, and other information.

Table 37 details potential housing units in opportunity sites by undeveloped sites and soft sites. Table 38 categorizes the potential housing units by zoning district and lists the build out capacities of potential housing sites according to permitted residential densities.

Table 37

Housing Potential: Undeveloped Site and Softsites

	No. of Potential New Units	Acres
Industrial Areas (not including Mission Bay and South Bayshore)		
Undeveloped Sites	1,893	29.28
Soft Sites	1,806	30.16
Downtown		
Undeveloped Sites	3,548	18.96
Soft Sites	5,889	17.37
Marina Fillmore		
Undeveloped Sites	1,201	26.08
Soft Sites	1,974	39.92
Northeast		
Undeveloped Sites	762	13.50
Soft Sites	1,018	15.21
South Bayshore		
Undeveloped Sites	1,274	52.89
Soft Sites	619	21.57
Transbay (not including Terminal)		
Undeveloped Sites	4,941	9.29
Soft Sites	4,468	7.55
Transit Corridors		
Undeveloped Sites	2,066	83.05
Soft Sites	4,003	139.84
Rest of City		
Undeveloped Sites	1,354	81.91
Soft Sites	1,151	44.46
Undeveloped Sites Subtotal	17,039	314.96
Soft Sites Subtotal	20,928	316.08
TOTAL	37,967	631.04

TABLE 38
Housing Potential Estimates by Zoning and Density

Zoning Category	Area (Acres)	Zoned Density per Acre	Estimated Potential	Maximum Zoned Capacity
Residential Zoning Districts				
RH-1	153.80	14	1,454	2,153
RH-2	81.06	39	1,612	3,161
RH-3	42.61	43	1,620	1,832
RM-1	62.24	54	1,956	3,361
RM-2	9.96	72	420	717
RM-3	6.97	108	444	753
RC-3	0.44	108	34	47
RM-4	4.44	217	693	963
RC-4	11.82	217	1,503	2,564
Neighborhood Commercial Zoning Districts				
NC-1	7.44	54	341	402
NC-2	61.28	54	1,967	3,309
NC-3	31.56	72	1,346	2,272
NCD	13.70	54	942	740
NC(S)	8.64	108	464	933
Mixed Use Districts				
Chinatown	1.18	217	167	256
RSD	4.28	217	441	928
SLI	2.61	217	97	566
SLR	4.08	217	155	884
SSO	4.01	217	207	869
Downtown Commercial Districts				
C-2	10.03			
C-3-G	19.75	348	4,466	6,874
C-3-O	10.76	348	10,232	3,745
C-3-R	0.95	348	456	331
C-3-S	6.63	348	3,450	2,309
C-M	10.16	217	507	2,205
Industrial Districts				
M-1	25.26	54	1,247	1,364
M-2	35.39	54	1,746	1,911
TOTALS	631.03		37,967	45,450

2. Projects in the Pipeline

Housing production moves through the multi-tiered approval process. A project is first reviewed by the Planning Department for compliance with the Planning Code and consistency with the General Plan. The project then goes through review by the Department of Building Inspection (DBI) for approval and issuance of a building permit. Once construction is finished and the project passes inspection by DBI, it is issued a certificate of final completion. Only when a project receives a certificate of final completion can the housing units be counted as adding to San Francisco's housing stock.

As of March 1, 2001, the City Planning Department was reviewing 88 projects with 4,801 units. One hundred fifty-three projects with 1,792 units had been approved by the Planning Commission but have yet to apply for building permits. At the same time, the DBI was reviewing 192 applications for 1,300 units. Over 2,747 units in 279 projects have received Planning Department approval and had building permits issued or approved. A number of these projects have already started construction and several are nearly complete but are yet to receive DBI's certificate of final completion.

For the purposes of this report, the new housing construction pipeline consists of projects approved by the Planning Department and with permit applications filed with or approved by DBI. As of March 1, 2001, the new housing construction pipeline totaled 4,047 units. It should be noted that project applications and permitting activities in the near future could increase the number of new housing production in the next five years.

TABLE 39
New Housing Construction Pipeline

NEW HOUSING CONSTRUCTION PIPELINE		
	No. of Projects	No. of Units
Building Permit Applications Filed	192	1,300
Building Permits Issued or Approved	279	2,747
Total Pipeline	471	4,047

3. Realization of Housing Potential

Better Neighborhoods 2002

Better Neighborhoods 2002 was initiated to address the City's housing and transportation challenges by strengthening the link between land use and transportation so each supports the other. Three pilot neighborhoods selected to serve as model for other areas in the City are Balboa Park, Upper Market and Central Waterfront. These three areas could see 4,200 units in potential housing sites, however, exact numbers would be available at the completion of the planning process in 2002.

Housing in Neighborhood Commercial Districts

Current City Planning Code regulations and General Plan housing policies encourage housing over commercial-retail whenever possible. Current national interest in transit-oriented development and the proximity of neighborhood commercial districts to transit preferential streets make in-fill sites in these districts ideal for development. Mixed-use commercial/residential projects accounted for a significant amount of new building construction between 1990 and 2000. Opportunity sites in neighborhood commercial districts cover over 122 acres and have the potential for 5,000 new housing units over commercial ground floor developments.

Housing in Residential Areas

Residential development on remaining vacant residentially zone sites will continue as market pressure intensifies to build on available residential sites. These sites generally have low density RH-1 or RH-2 zoning which permit one or two units per lot. It is estimated that there is an in-fill housing potential of approximately 3,000 units on vacant and underutilized RH-1 / RH-2 parcels. There is an additional potential for 6,700 new units in vacant or underutilized medium density residential zoned parcels.

Housing in Industrial Areas

Housing development in the largely industrial areas South of Market made up a significant 25% of new construction in the last 11 years of new housing production. The live/work boom brought on conflicts as new residential uses threatened to force out long-time industrial uses. While interim zoning controls are preserving some industrially zoned lands from residential development in industrial protection zones, vacant and underutilized parcels in the mixed use housing zones total 61 acres, with a potential for about 3,000 new housing units.

Housing on Public Land

Most San Francisco city agencies do not own large tracts of land that do not serve as part of their mission. There are occasional exceptions, for example when new technology results in operational changes or when missions change over time. A few city agencies, notably MUNI, and the San Francisco Unified School District have found over time that some of these parcels can either be disposed of, or can be jointly used with other uses.

MUNI in particular has been exploring new uses for sites. Muni staff have identified three sites where housing might be possible in the future. One is the Kirkland Bus Yard in Fisherman's Wharf. Muni will soon undertake a real-estate analysis of this site to explore potential uses. A second site is the Presidio Trolley Division at Geary and Masonic. For many years, this served as Muni's headquarters. As Muni's offices move to Civic Center, the Geary Street offices are being vacated. MUNI is investigating future uses for either the Geary Street buildings, or for the air space above the yard. Finally,

the Muni's property near Balboa Park is being investigated in the Planning Department's Balboa Park Special Area Plan, which is part of the Better Neighborhoods 2002 program.

The San Francisco Unified School District is currently preparing a Facilities Master Plan, which will identify surplus land which could become available for housing. The Water Department and the Community College District have interests in the Balboa reservoir site. It is also within the Balboa Park Station Area Neighborhood Plan, which is part of the Planning Department's Better Neighborhoods 2002 program.

Finally, the City is planning housing for several acres of vacant land in the former Central Freeway right-of-way in the Planning Department's Better Neighborhoods 2002 Program. Having recently been transferred into City ownership from the State, these properties form the core of the Market and Octavia Neighborhood Plan area.

V. CONSTRAINTS AND RESOURCES

A. CONSTRAINTS TO HOUSING PRODUCTION AND CONSERVATION

1. Land Availability and Cost

Both market-rate and affordable housing developers report that acquiring sites for housing in San Francisco is a challenge. One of the results has been the development of new housing on sites that were not planned for housing, some times in areas where the services and social infrastructure that are needed to create a pleasant neighborhood do not exist. In order to meet the City's housing goals, areas that can absorb new development in the context of a pleasant neighborhood must be identified. Section IV, "Land Suitable for Residential Development," describes locations where the potential for new housing exists. Section IV.B., "Resources to Meet Housing Needs," describes policies and programs that the City is using or can consider to encourage appropriate housing development to meet housing needs.

2. Infrastructure

San Francisco's current housing stock is approximately 340,000 units. The housing goal that has been set for San Francisco by the Department of Housing and Community Development and the Association of Bay Area Governments is 20,372 units by 2006. This is an approximately 6% growth. The capacity of infrastructure including water, sewage treatment, and utility services is generally not a constraint to meeting San Francisco's housing goals. Many potential development sites are in areas which are served by the existing infrastructure. New district plans or large projects may need local infrastructure improvements to connect to the City's systems.

The San Francisco Public Utilities District's *Final Urban Water Management Plan* projects water demand from residential and commercial customers. While the district does project an increase in total demand, it also expects residential water use to decline, even as population increases, because of increased conservation measures and efficiency. The plan projects sufficient water supply in normal years, though during drought years, and especially during multiple drought years, demand will exceed supply. The SFPUC

has committed to a number of programs to reduce water demand, which are described in greater detail in the management plan.

In 1997, the city completed a major program to upgrade its wastewater treatment system. Because San Francisco has a combined sanitary and stormwater system, the largest volume of wastewater occurs during wet weather. The City's Clean Water Program reports that treatment capacity is available to serve expected growth. However, there are areas where local sewers, which transport waste to the treatment system, may be inadequate. New area plans or large projects may need local infrastructure improvements to connect to the City's system.¹

San Francisco's solid waste is transferred to the Altamont Landfill, in Alameda County. In 1988 the city signed a long-term disposal agreement which provides for the disposition of up to 15 million tons of solid waste at Altamont. As of January 1, 2000, approximately 7.1 million tons of this capacity had been used, leaving a balance of 7.9 million tons. At the current rate of disposal, the city's capacity is sufficient through 2008. The Solid Waste Program is actively working to increase recycling, resulting in less disposal at the landfill. The program hopes to achieve recycling rates that would extend the capacity of the landfill until 2011.²

Pacific Gas and Electric Company has filed a "Load Forecast" for San Francisco through 2009 with the San Francisco Public Utilities Commission. This forecast is the basis for capital and operating plans, and covers both residential and commercial demand. PG&E is planning for a 35% increase in demand between 1999 and 2009.

3. Availability of Open Space

Most of the City's existing public open space is on the western side of the city, while considerable recent housing construction and much of the housing potential is downtown,

¹ Gene Handa, Sanitary Engineer, San Francisco Department of Public Works, Bureau of Engineering. Telephone Conversation, May 11, 2001.

² This information is on the Solid Waste Program's website: www.sfrecycles.org.

close to downtown, or on the eastern side of the City. New households in these areas will need open space and opportunities for recreation. Recent planned areas have included new open space for their new residents. For example, the Mission Bay project will include new public open space to serve the residents of its 6,000 new units and surrounding areas. The Rincon Point-South Beach Redevelopment area includes two new shoreline parks. As new areas are planned for housing, additional open space will be needed and should be part of future redevelopment plans, area plans, rezoning provisions, and subdivision projects.

4. Access to Commercial and Other Services

Many of the areas where new housing is likely to occur now have a rich mix of uses to serve new residents. Additionally, much future housing will be in mixed use developments. If these areas well planned and well-designed, new residents and new businesses will enrich existing neighborhoods. Plans for new neighborhoods and for improving existing neighborhoods will need to incorporate commercial uses and other services needed by residents.

5. Transportation

Recent job and population growth have stretched San Francisco's transportation system. Some streets are currently operating at or beyond their capacity. Transit is not adequate and alternative modes often not accessible. The availability of free parking and its contribution to congestion needs to be assessed. Careful planning will be necessary to assure that current and future residents are able to travel conveniently to jobs, shopping and recreation. Transit planners using the ABAG population growth assumptions have begun preparing a long-range plan, *The San Francisco Transit Expansion and Enhancement Plan*. It will include a public involvement process and will be completed in 2001.

6. Planning Policies and Processes

Project sponsors must obtain building and planning permits to assure that code standards are met. Projects must comply with Planning Code regulations of land use, density, lot

size, height, open space, setback, and parking. The projects deviating from these standards or raising planning or environmental concerns are subject to greater scrutiny, and conditional use approval, variances, discretionary review, rezoning, planned unit development approval, or environmental review may be necessary. Typically, these special permits take longer to process because they require greater study and analysis, public notification, public hearings, and approval by the Planning Commission or the Zoning Administrator. The approval of such permits can also be subject to certain conditions or mitigation requirements.

Conditional Use application review involves a noticed public hearing at the Planning Commission. The Commission's review determines whether the proposed project is "necessary and desirable for, and compatible with the neighborhood, not detrimental to . . . persons in the vicinity, . . . and complies with the General Plan."³

In 1986, Proposition M was adopted by the voters as an Initiative Ordinance that requires the review of all new residential developments for consistency with the General Plan Priority Policies⁴ that seek to conserve and protect existing housing and neighborhood character.

These processes take time to administer and can add to the cost of the project. However, many of the rules and processes are necessary to ensure that San Francisco's quality of life is maintained and enhanced by projects, while at the same time, appropriate densities are encouraged in suitable locations. San Francisco's goal is to involve the community, and thereby improve residents' acceptance of appropriate housing development. Poorly designed project could adversely affect neighborhood acceptance of affordable housing projects.

By definition, these regulations are "constraints" in that they impose limitations or requirements on development. However, these regulations have been developed over

³ San Francisco Planning Code, Section 303(c).

⁴ San Francisco Planning Code, Section 101.1.

time to deal with the impacts of development. Without these regulatory controls even greater constraints resulting from public opposition to development could result in broadly written moratoria or sweeping growth limitations, approaches that often are not sensitive enough to need for balanced long-range planning.

7. Permit Application Fees

The Planning Department and the Bureau of Building Inspection require fees for building permits based on a project's cost of construction. Generally, a project requires only a building permit. However, some projects also require additional permits such as Conditional Use, Demolition, Coastal Zone, or may require other actions such as Zoning Variances, Zoning Reclassification, Subdivision, or Environmental Evaluation. Payment of an application fee may be required for these additional permits. The application fee for Conditional Use and Coastal Zone permits, and for Variances and Environmental Evaluation are based on the cost of construction. The table below provides an example of various fees.

TABLE 40
Sample of Permit Fees Based on Construction Costs, 2000

Construction Cost \$	Building Permit BBI	City Planning Plan Check	Conditional Use, Variance, Coastal	Environmental Evaluation
\$10,000	\$220	\$360 + .45% of valuation over \$10,000 + 4.5%	\$1,130	\$1,074
\$50,000	\$786	Same	\$1,338	\$1,259
\$100,000	\$1,185	\$765 + .35% of the valuation over \$100,000 + 4.5%	\$5,808	\$1,490
\$500,000	\$3,799	\$2,165 + .27% of the valuation over \$500,000 + 4.5%	\$3,677	\$3,006
\$1,000,000	\$8,250	Same	\$6,233	\$4,439

These fees are in line with those charged by other cities. Some project fees in San Francisco may be higher than in other less densely populated Bay Area cities because of the complexity and extensive public review that is required in San Francisco. Permit fees are not a substantial proportion of development cost and are not seen as a significant constraint on housing development. Development projects by non-profit housing organizations are exempt from City Planning permit fees pursuant to City Planning Code Section 351(e), 360(g), and 361(c). Other new construction fees include water and sewer hookup and school fees.

8. Building Code Standards

Various building code provisions add to the cost of construction and thereby may act as a constraint on building development. The code provisions are based on considerations of health and safety. However, there may be alternative less costly ways to achieve the same level of health and safety. For example, the San Francisco Building Code permits fire escapes for certain required exits in existing buildings, whereas the State Uniform Building Code (UBC) does not. Parapet requirements for residential wood frame construction are waived under California code if the roof is constructed entirely of fire-rated construction. Local amendments also permit wood frame on a concrete podium up to a height of four stories if fire truck access to the podium is provided.

9. Infrastructure Standards

The City imposes various on- and off-site infrastructure improvements on new developments whenever such improvements do not already exist. The various standards for street widths, curbing requirements, and circulation improvements have been developed over time and are not believed to be excessive or to impose undue burdens on development. They apply citywide and conform to the developed pattern of the City. Given the densities at which residential land is developed in San Francisco, these infrastructure costs, even when borne by the developer, represent a relatively small cost per unit.

10. Community Acceptance

Because of the public nature of the development process, and San Francisco's tradition of public involvement in policy discussions, residents sometimes voice strong opposition to housing projects in their neighborhood. This can lead to time delays, additional cost, or a reduction in the number of units produced. The City is committed to the involvement of citizens in the planning process. Approaches to address these "Not In My Back Yard" situations are described below in Section IV.B., *Resources and Approaches*.

B. RESOURCES AND APPROACHES TO MEET CURRENT AND FUTURE HOUSING NEEDS

San Francisco housing policy in the 1980s and 90s encouraged both residential development and housing preservation. These policies led to: 1) adoption of rezoning controls which protect existing residential densities; 2) rezoning of commercial, industrial, and publicly owned sites to residential use; 3) permitting affordable housing to exceed the basic floor area ratio in downtown office development districts; 4) permitting higher densities in adopted affordable housing development districts; 5) interim zoning controls to establish a mixed use area where housing and live/work uses would be encouraged, and buffer zones where residential and live/work uses would require conditional use authorization; 6) policies controlling the merger of residential units to help retain the existing supply of housing in the City.

The Planning Department has taken a number of steps to improve permit processing including: filling staff vacancies and adding new positions in permit processing, providing for overtime work to reduce the work backlog, improving steps in permit application and information submittals, and reorganizing staff sections to create more space for permit review staff. Additionally, the department continues to improve its computerized permit information tracking system

In order to meet the City's housing goals, while maintaining the residential environment for current and future residents, areas that can absorb new development in the context of a pleasant neighborhood must be identified. These will include Redevelopment Areas,

areas that are part of the City's Better Neighborhoods program, and areas where Community Plans will soon be undertaken. The City is also investigating changes to the Planning Code which would encourage new housing in areas close to transit. Other possible sites for new affordable and market rate housing may include publicly owned sites, and housing built over large commercial or institutional uses. Market rate housing development subject to Inclusionary Housing requirements will also result in new affordable units.

A number of approaches are available or could be developed to facilitate housing production. The list below includes a broad range of options and is not meant to be comprehensive. These options would be discussed and analyzed in the next phase of the Housing Element.

1. Reduce uncertainty for housing development and develop community support

- Adopt plans and programs and specialized zoning that will guide and foster housing production at appropriate locations
 - Neighborhood based Specific Plans that establish development profiles with completed program EIRs that obviate the need for case by case determinations
 - NC-T Transit Oriented Neighborhood Commercial District: Zoning designations in linear shopping streets along transit corridors that provide convenience goods and services where increased housing densities above the ground floor and reduced residential parking requirements (due to proximity to transit, services, and retail) are mandated.

2. Increase availability of land for housing

- Rezone surplus industrial land to mixed use areas for high density housing
- Allow increase in housing densities in other appropriate areas
- Adopt minimum development standards to assure that commercial sites are not underutilized and housing development is maximized

- Require replacement of housing units demolished due to public or private action
- Facilitate the construction of new housing in C-3 (downtown commercial) zoning districts
- Reduce parking requirements

3. Facilitate permit processing

- Simplify and expedite the processing of building permits
- Prioritize review of housing projects
- Provide interdepartmental coordination and project review
- Prepare master environmental impact reports covering all potential new housing in a selected area to streamline the approval and construction processes

4. Generate capital funding

- Identify availability of government funding programs to cover part of the current and future housing needs including:
 - Federal housing resources such as CDBG, HOME, Lead Hazard Reduction Grant, Section 202 Elderly Housing Program, Section 811 Disable Housing Program, Low-Income Housing Tax Credits, McKinney Supportive Housing Program, and Comprehensive Grants
 - State housing resources including CHFA Multifamily Bonds, and Low-income Housing Tax Credits.
 - City housing resources that include Affordable Housing Bonds, Tax Increment Bonds, Hotel Tax Fund, Jobs-Housing Linkage Program, Hotel Conversion Mitigation Fee, Seismic Rehabilitation Bonds, Tax-Exempt Revenue Bonds, Code Enforcement Rehabilitation Fund, Surplus City-owned land, and SFRA owned land
- Identify availability of private resources including private lenders, inclusionary housing requirements, and developer contributions

5. Support housing affordability

- Land banking program of land acquisition for future affordable housing development
- Relax minimum lot sizes and parking requirements for affordable housing
- Reduce or eliminate permit fees for permanent low income affordable housing projects
- Monitor housing production to ensure a variety of housing types that meet the city's diverse population needs
- Require that all districts in the city provide a fair share of low- and moderate-income housing
- Create property tax exemptions or lower rates for affordable housing
- Identify resources for the rehabilitation of residential hotels
- Provide density bonuses for projects with a share of low-income housing units.

VI. COASTAL ZONE HOUSING

The City's entire western shoreline is within California's coastal zone area. The coastal area zone boundary includes about 30 residential blocks fronting near the shoreline. California State regulations require that the Housing Element detail new construction and demolition activity occurring along the California Coastal Zone.

Fifty-seven new units in 22 structures were built between 1990 and 2000, an average of about five new units a year. In this same period, six buildings with eight units were demolished although four of these were rebuilt with a total of six units. Fourteen projects with 64 units are slated to be constructed in the coastal zone.

Within the larger census tract areas fronting the coastal shoreline (about 150 blocks), new construction in in-fill sites has averaged about 12 units per year and demolition has averaged about four a year.

TABLE 41

New Construction and Demolition Activity in Coastal Area, 1990-2000

Coastal Area New Construction and Demolition Activity (1990 - 2000)				
	Coastal Area		Larger Census Tracts	
	No. of Structures	No. of Units	No. of Structures	No. of Units
New Construction Completed	22	57	61	127
Demolition Completed	6	8	57	46
Pipeline	12	59	29	231

Residential development in the Coastal Zone must conform to City Planning Code density requirements. Development projects in the coastal zone also are required to apply for a coastal permit and are reviewed for consistency with Western Shoreline General Plan policies contained in the Western Shoreline Plan (Objective II, Policies 1 – 4), and Proposition M policies, which aim to preserve the City's supply of affordable housing.

In addition, new construction and demolition permits are reviewed for consistency with Article 10 of the California Government Code which requires that affordable lower income units converted or demolished in the Coastal Zone Area be replaced on a one-for-one basis and that new housing developments, where feasible, provide housing units for persons and families of low or moderate income.

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Anita Theoharis, President
William W. Fay, DDS
Roslyn Baltimore
Hector Chinchilla
Cynthia Joe
Myrna Lim
Jim Salinas

Department of City Planning

Gerald G. Green, Director of Planning
Amit Ghosh, Chief of Comprehensive Planning
Catherine Bauman
Miriam Chion
Teresa Ojeda
Jonathan Lau
Sharon Young

Contacts

If you have comments, corrections and requests for copies of this document, and if you would like to be notified of the next steps in the Housing Element preparation process, please contact us:

Catherine Bauman, 415-558-6287, catherine_bauman@ci.sf.ca.us

Teresa Ojeda, 415-558-6251, teresa_ojeda@ci.sf.ca.us

Jonathan Lau, 415-558-6383, jon_lau@ci.sf.ca.us

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